

360iResearch

Post-Operative Wound Dressings Market

Global Forecast 2026-2032

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1. Preface

1.1. Objectives of the Study

- Which suppliers document identifiable Post-Operative Wound Dressings and accepted therapy-platform offerings, and how do ownership or licensing relationships define their commercial rights?
- What qualification, formulary, purchasing-evidence, or contractual conditions must an offering satisfy for Hospitals, Freestanding Surgical Centers, and the other included end users?
- How do jurisdiction-specific authorization and purchasing conditions distinguish legal access from documented commercial availability and buyer acceptance?
- Which distribution, delivery, and support commitments distinguish Direct Institutional Sales, Wholesale & Distribution, Retail & Dispensing, and Direct-to-Consumer Sales?
- What product-comparison evidence, incumbent relationships, contractual terms, and continuity requirements affect a buyer's ability to switch dressings or therapy-platform arrangements?
- How do Healing Pathway and Surgical Application relate to documented offering eligibility and purchasing requirements without treating taxonomy membership as proof of clinical equivalence?
- What qualitative trade-offs in purchasing budgets, reimbursement conditions, delivery obligations, and organizational support distinguish commercial options, and what must be verified before commitment?

1.2. Market Definition

The Global Post-Operative Wound Dressings market covers finished dressing offerings across the accepted Dressing Type hierarchy, together with Standard Dressing Therapy, Negative Pressure Wound Therapy, Topical Oxygen Therapy, and Bioelectric Wound Therapy within the accepted therapy-platform scope. It includes Closed Surgical Wounds, Open Wounds Healing by Secondary Intention, and Open Wounds Awaiting Surgical Closure across the accepted Surgical Application categories.

The commercial focus is the identifiable dressing or therapy-platform offering and its supplier-to-buyer relationship. Manufacturers, offering owners, licensors, distributors, and purchasing organizations are considered in relation to those offerings, not their entire corporate portfolios. Upstream materials provide value-chain context rather than equivalent finished offerings; surgical procedures and professional care delivery are downstream activities rather than dressing products.

The geographic boundary is Global. End-user coverage includes Hospitals, Freestanding Surgical Centers, Office-Based & Community Providers, Residential & Post-Acute Care Facilities, Home Healthcare Providers, and Self-Care Households. Category inclusion establishes study coverage without implying that every offering is authorized, available, or

eligible for purchase in every jurisdiction. Unrelated wound-care activity does not enter the market solely because it shares a supplier, material, or channel.

1.3. Market Segmentation & Coverage

Dressing Type distinguishes the accepted material and format categories: Gauze & Absorbent Pad Dressings, Composite & Island Dressings, Film & Membrane Dressings, Wound Contact Layers, Foam Dressings, Alginate Dressings, Gelling Fiber Dressings, Hydrocolloid Dressings, Hydrogel Dressings, Superabsorbent Dressings, Absorbent Acrylic Dressings, Collagen Dressings, Acellular Extracellular Matrix Dressings, Chitosan Dressings, Hyaluronic Acid Dressings, Activated Charcoal Dressings, Capillary Action Dressings, and Biocellulose Dressings. This axis organizes offering comparisons without treating a shared material label as evidence of interchangeability.

Therapy Platform includes Standard Dressing Therapy, Negative Pressure Wound Therapy, Topical Oxygen Therapy, and Bioelectric Wound Therapy. These are distinct commercial platform categories within the study. Dressing and platform relationships require separate interpretation of the offering, buyer arrangement, and delivery obligations; their inclusion does not make the categories additive.

Antimicrobial Technology includes No Declared Antimicrobial Technology, Silver-Based Antimicrobials, Iodine-Based Antimicrobials, Honey-Based Antimicrobials, Polyhexamethylene Biguanide, Chlorhexidine, Copper-Based Antimicrobials, Chitosan-Based Antimicrobials, Octenidine, Quaternary Ammonium Compounds, Bismuth Compounds, Enzyme-Based Antimicrobials, Antibiotics, DACC Microbial Binding, and Multi-Agent Antimicrobial Systems. The axis preserves the declared commercial classifications without inferring a common mechanism, equivalent product claims, or clinical superiority. No Declared Antimicrobial Technology is a disclosure category, not a conclusion about biological activity.

Healing Pathway separates Closed Surgical Wounds, Open Wounds Healing by Secondary Intention, and Open Wounds Awaiting Surgical Closure. It frames application-specific commercial questions without assuming that an offering documented for one pathway is eligible for another.

Surgical Application covers Neurological Surgery, Endocrine Surgery, Ophthalmic Surgery, Ear, Nose, Oral & Throat Surgery, Respiratory Surgery, Cardiovascular Surgery, Hematologic & Lymphatic Surgery, Gastrointestinal & Abdominal Surgery, Urinary Tract Surgery, Male Reproductive Surgery, Gynecologic Surgery, Obstetric Surgery, Musculoskeletal Surgery, and Skin & Breast Surgery. This axis identifies the surgical context for evaluating documented participation and purchasing requirements rather than attributing all activity in a specialty to wound dressings.

End User distinguishes Hospitals, Freestanding Surgical Centers, Office-Based & Community Providers, Residential & Post-Acute Care Facilities, Home Healthcare Providers, and Self-Care Households. It locates the buyer or care-setting relationship relevant to qualification, procurement responsibility, and continuity of supply.

Sales Channel includes Direct Institutional Sales, Wholesale & Distribution, Retail & Dispensing, and Direct-to-Consumer Sales. It distinguishes the commercial route from the identity of the end user: a buyer setting does not, by itself, establish how an offering reaches that buyer or who holds the relevant channel rights.

Fixation Design includes Bordered Adhesive Dressings, Borderless Adhesive Dressings, and Nonadhesive Dressings. This axis supports comparison of documented offering formats and buyer requirements without implying suitability or switching equivalence from the category name alone.

Absorbency includes Nonabsorptive, Low Absorbency, Moderate Absorbency, High Absorbency, and Ultra-High Absorbency. These classifications organize the offering comparison; they do not independently demonstrate that different products satisfy the same purchasing requirement.

All axes describe the same accepted market through different commercial lenses. An offering can be represented across several axes without creating separate incremental activity, and a category's inclusion does not establish a particular supplier's capability or local commercial access.

Table 1. Global Post-Operative Wound Dressings Market Segmentation & Coverage

Segmentation	Coverage
Absorbency	• Low Absorbency • High Absorbency • Moderate Absorbency • Nonabsorptive • Ultra-High Absorbency
Antimicrobial Technology	• No Declared Antimicrobial Technology • Silver-Based Antimicrobials • Iodine-Based Antimicrobials • DACC Microbial Binding • Polyhexamethylene Biguanide • Honey-Based Antimicrobials • Enzyme-Based Antimicrobials • Bismuth Compounds • Multi-Agent Antimicrobial Systems • Antibiotics • Chlorhexidine • Octenidine • Quaternary Ammonium Compounds • Copper-Based Antimicrobials • Chitosan-Based Antimicrobials

Table 1 - continued

Segmentation	Coverage
Dressing Type	• Foam Dressings • Gauze & Absorbent Pad Dressings • Composite & Island Dressings • Gelling Fiber Dressings • Wound Contact Layers • Superabsorbent Dressings • Film & Membrane Dressings • Alginate Dressings • Hydrocolloid Dressings • Collagen Dressings • Acellular Extracellular Matrix Dressings • Hydrogel Dressings • Hyaluronic Acid Dressings • Absorbent Acrylic Dressings • Chitosan Dressings • Biocellulose Dressings • Activated Charcoal Dressings • Capillary Action Dressings
End User	• Hospitals • Home Healthcare Providers • Office-Based & Community Providers • Freestanding Surgical Centers • Residential & Post-Acute Care Facilities • Self-Care Households
Fixation Design	• Bordered Adhesive Dressings • Nonadhesive Dressings • Borderless Adhesive Dressings
Healing Pathway	• Closed Surgical Wounds • Open Wounds Healing by Secondary Intention • Open Wounds Awaiting Surgical Closure

Table 1 - continued

Segmentation	Coverage
Sales Channel	• Wholesale & Distribution • Direct Institutional Sales • Retail & Dispensing • Direct-to-Consumer Sales
Surgical Application	• Musculoskeletal Surgery • Skin & Breast Surgery • Gastrointestinal & Abdominal Surgery • Cardiovascular Surgery • Obstetric Surgery • Gynecologic Surgery • Neurological Surgery • Respiratory Surgery • Urinary Tract Surgery • Ear, Nose, Oral & Throat Surgery • Male Reproductive Surgery • Hematologic & Lymphatic Surgery • Ophthalmic Surgery • Endocrine Surgery
Therapy Platform	• Standard Dressing Therapy • Negative Pressure Wound Therapy • Bioelectric Wound Therapy • Topical Oxygen Therapy

Sources & Evidence

1. FDA K261311 - HYALOMATRIX: Clearance and 510(k) Summary

   · Taxonomy evidence: The September xx.xx 2026 clearance and enclosed summary identify HYALOMATRIX as a single-use hyaluronic-acid-derivative wound dressing with surgical-wound indications, including donor sites and dehiscence. This directly supports category identity, not Global sales or 2025 revenue. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf26/K261311.pdf))

2. FDA K210024 - NeoMatriX Wound Matrix: Clearance and 510(k) Summary

   · Taxonomy evidence: The October xx.xx 2021 record identifies NeoMatriX as an acellular extracellular-matrix wound dressing and includes surgical wounds among its indications. It establishes a qualifying category example without resolving all dressing-versus-tissue-replacement boundaries. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf21/K210024.pdf))

   · Taxonomy evidence: The same record calls the device a collagen wound dressing while expressly describing acellular extracellular-matrix characteristics. Therefore, regulatory collagen terminology alone cannot separate the retained commercial Collagen Dressings and Acellular Extracellular Matrix Dressings peers. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf21/K210024.pdf))

   · Taxonomy evidence: The shared terminology supports an explicit product-identity precedence rule rather than treating the commercial construction partition as a reproduction of regulatory codes. This is a classification inference, not a new regulatory distinction. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf21/K210024.pdf))

3. AccessGUDID - OASIS, Device Identifier 00827002466234

   · Taxonomy evidence: The OASIS record identifies an animal-derived wound matrix dressing, links it to K061711 and reports In Commercial Distribution. Its public version date is July xx.xx 2025. This corroborates a registered commercial matrix-dressing identity, not realized postoperative sales or blanket eligibility of matrix products. ([accessgudid.nlm.nih.gov](https://accessgudid.nlm.nih.gov/devices/xx.xx))

4. FDA K190268 - Hydrofera Blue READY-Border: 510(k) Summary
   - Taxonomy evidence: The 2019 regulatory summary identifies methylene blue and gentian violet as antibacterial dyes in one finished dressing and includes post-surgical incisions among its indications. This directly establishes a postoperative dual-agent example for the commercial combination category without relying on drug-device combination status. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf19/K190268.pdf))
   - Taxonomy evidence: The same postoperative dressing is described as an absorptive polyurethane foam with an outer film and silicone adhesive border. This independently corroborates that a foam construction can retain a distinct multi-agent antimicrobial allocation. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf19/K190268.pdf))
   - Taxonomy evidence: The documented silicone adhesive border supplies a postoperative regulatory example of integral bordered fixation, separate from the foam matrix and antibacterial agents. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf19/K190268.pdf))
5. FDA K180533 - Procellera Composite Antibacterial Wound Dressing
   - Taxonomy evidence: The December xx.xx 2018 clearance identifies a finished antibacterial dressing with an integral electrical architecture and professional-use indications including surgical incisions and graft sites. This establishes postoperative regulatory identity without asserting clinical superiority or worldwide availability. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf18/K180533.pdf))
   - Taxonomy evidence: The finished product has a contact layer, an absorbent layer and an adhesive outer layer. It is a regulatory example of an integrated cover architecture that can be allocated independently from its therapy platform. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf18/K180533.pdf))
6. AccessGUDID - Procellera Composite, Device Identifier 00894318002456
   - Taxonomy evidence: The registry assigns the explicit nomenclature Bioelectric wound dressing, links the device to K180533 and reports a single-use prescription product In Commercial Distribution. The visible public version is dated January xx.xx 2026. This supports current recorded commercial identity, not attributed sales or a Global platform share. ([accessgudid.nlm.nih.gov](https://accessgudid.nlm.nih.gov/devices/xx.xx))
7. Sandwell Area Formulary - Wound Management Products
   - Taxonomy evidence: The public formulary explicitly describes Flaminal Forte and Hydro as alginate gels containing antimicrobial enzymes. This independently establishes enzyme-platform terminology beyond the earlier product-name lead; the broad wound listing does not establish exact current postoperative labeling. ([sandwellandwestbhamccgformulary.nhs.uk](https://sandwellandwestbhamccgformulary.nhs.uk/chaptersSubDetails.asp?FC=xx.xx&FormularySectionID=xx.xx&SubSectionID=A100&SubSectionRef=A5))
8. Schülke UK - octenilin Wound Gel
   - Taxonomy evidence: The manufacturer's UK description explicitly identifies octenidine as a preservative with an antimicrobial protective role in the wound gel. Its listed applications concern chronic wounds and burns, not an explicit postoperative indication. This resolves the ingredient lead only; it does not independently prove market-level category coverage or postoperative eligibility. ([schuelke.com](https://www.schuelke.com/en-uk/products/xx.xx/octenilin-wound-gel/))
9. Leukomed Sorbact - Supporting Documentation, Independent External Assessment, August 2020
   - Taxonomy evidence: The independent assessment's technology overview identifies a single-use postoperative DACC bacteria-binding dressing and distinguishes its binding function from killing microorganisms. This directly supports the retained microbial-binding category without claiming chemical biocidal equivalence or adopting an efficacy estimate. ([nice.org.uk](https://www.nice.org.uk/guidance/HTG567/documents/supporting-documentation))
   - Taxonomy evidence: The assessment separates the DACC contact technology from the absorbent pad, adhesive film and postoperative application. It supports treating microbial-binding technology as a cross-cutting allocation rather than a substitute dressing-construction family. ([nice.org.uk](https://www.nice.org.uk/guidance/HTG567/documents/supporting-documentation))

10. NHS Supply Chain - Advanced Wound Care Specification
    - Taxonomy evidence: The specialty procurement specification explicitly recognizes temporary matrix dressings separately from collagen dressings and sets a nonimplant purchasing boundary for that named group. This is an English procurement-category anchor, not a universal regulatory definition or automatic eligibility rule for acellular products. ([sccl.nhs.uk](https://www.sccl.nhs.uk/wp-content/uploads/2026/xx.xx/Advanced-Wound-Care-Specification.pdf))
    - Taxonomy evidence: Procurement separates base dressing families and treats antimicrobial status as a cross-cutting property. These are English purchasing definitions, not Global demand estimates. ([sccl.nhs.uk](https://www.sccl.nhs.uk/wp-content/uploads/2026/xx.xx/Advanced-Wound-Care-Specification.pdf))
    - Taxonomy evidence: Recognition of temporary matrix dressings supports a dressing-versus-implant distinction at the commercial category level, but does not identify every qualifying acellular matrix or settle dual-described skin-substitute products. ([sccl.nhs.uk](https://www.sccl.nhs.uk/wp-content/uploads/2026/xx.xx/Advanced-Wound-Care-Specification.pdf))
    - Taxonomy evidence: Separate nonwoven-island and film-island purchasing groups support aggregating conventional integrated pad-and-backing covers.
    - Taxonomy evidence: Alginates and gelling fibers are explicitly distinguished within their purchasing group.
    - Taxonomy evidence: Superabsorbent dressings form a dedicated lot, distinct from foams and conventional pads.
    - Taxonomy evidence: Hydrobalance biocellulose dressings are explicitly named.
    - Taxonomy evidence: Specialty purchasing includes topical oxygen and electrostimulation wound therapy.
    - Taxonomy evidence: Electrostimulation wound therapy is recognized, without separately establishing postoperative dressing-only demand.
    - Taxonomy evidence: Antimicrobial properties occur across material-based dressing families rather than constituting one base construction.
11. Surgical Dressings - Policy Article A54563
    - Taxonomy evidence: Multi-component dressings are classified by a predominant component; composite products cannot be unbundled into constituent dressing claims. US coding rules are terminology anchors, not the Global market boundary. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx&bc=xx.xx&contractorName=all&contractorNumber=all&sortBy=updated&updatePeriod=xx.xx&ver=xx.xx))
    - Taxonomy evidence: Recognizes woven/nonwoven gauze and specialty absorptive pads.
    - Taxonomy evidence: Defines conventional composite covers separately from foam, gelling-fiber, hydrocolloid and hydrogel absorptive layers.
    - Taxonomy evidence: Contact layers are porous, nonabsorptive interfaces, distinct from absorptive covers.
    - Taxonomy evidence: Recognizes foam wound covers and foam fillers.
    - Taxonomy evidence: Recognizes alginate/gelling-fiber covers and fillers.
12. Surgical Dressings - Local Coverage Determination L33831
    - Taxonomy evidence: The US policy recognizes transparent-film dressings as a named dressing family; reimbursement eligibility is not a Global sales measure. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?lcdid=xx.xx))
    - Taxonomy evidence: Separately recognizes hydrocolloid dressings and wound fillers.
    - Taxonomy evidence: Separately recognizes hydrogel dressings and wound fillers.
    - Taxonomy evidence: Recognizes collagen-based dressings and wound fillers as a distinct commercial family.

13. Drug Tariff Part IX - October 2026
    - Taxonomy evidence: The October 2026 tariff contains a named transparent absorbent acrylic-dressing category. Listing establishes purchasing recognition, not postoperative demand. ([nhsbsa.nhs.uk](https://www.nhsbsa.nhs.uk/sites/default/files/2026-xx.xx/Drug%20Tariff%20Part%20IX%20October%xx.xx.pdf))
    - Taxonomy evidence: Lists activated-charcoal absorbent dressings.
    - Taxonomy evidence: Lists a capillary-action absorbent-wound-dressing category.
    - Taxonomy evidence: Explicitly identifies DACC-impregnated contact and pad products; the listing alone does not establish postoperative labeling or chemical biocidal action.
14. FDA K143124 - KA01 Chitosan Wound Dressing
    - Taxonomy evidence: The regulatory summary identifies a chitosan wound-dressing family with surgical-wound and donor-site applications. It establishes category and indication history, not current sales or a commercial antimicrobial claim. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf14/K143124.pdf))
    - Taxonomy evidence: Chitosan construction and surgical applications are documented, but this record does not establish the antimicrobial positioning required for this technology allocation.
15. GPSDP October 26-27, 2022 Presentation - Wound Dressings with Animal-Derived Materials
    - Taxonomy evidence: The regulator's October xx.xx-xx.xx 2022 presentation addresses animal-derived wound dressings as a category. This record alone does not settle product-level exclusions for skin substitutes or reconstructive implants. ([fda.gov](https://www.fda.gov/media/xx.xx/download))
16. FDA Executive Summary - Classification of Wound Dressings Containing Drugs, September 20-21, 2016
    - Taxonomy evidence: The regulatory overview separates dressing substrates from antimicrobial additives and distinguishes antimicrobial claims from passive protection. It is a historical category reference, not current market-share evidence. ([fda.gov](https://www.fda.gov/media/xx.xx/download))
    - Taxonomy evidence: Drug-free gauze, hydrophilic, occlusive and hydrogel classifications are distinguished from antimicrobial-containing dressings.
    - Taxonomy evidence: Identifies silver among antimicrobial additives to solid wound dressings.
    - Taxonomy evidence: Identifies PHMB as an antimicrobial dressing additive.
    - Taxonomy evidence: Identifies chlorhexidine as an antimicrobial dressing additive.
    - Taxonomy evidence: Recognizes pDADMAC-containing dressings and cites a surgical-wound indication.
    - Taxonomy evidence: Identifies bismuth as an antimicrobial dressing additive.
    - Taxonomy evidence: Identifies bacitracin among antimicrobial additives to solid dressings.
    - Taxonomy evidence: Describes dressing functions including wound protection, exudate management and maintenance of a moist environment, supporting a standalone dressing-therapy class.
17. Trust BNF - Wound Management Products and Elasticated Garments
    - Taxonomy evidence: The institutional formulary organizes antimicrobial agents independently from base dressing construction; its broader wound-care scope does not establish postoperative sales. ([primarycare.northeastlondon.icb.nhs.uk](https://primarycare.northeastlondon.icb.nhs.uk/wp-content/uploads/2024/xx.xx/Wound-management-products-and-elasticated-garments.html))
    - Taxonomy evidence: Lists silver-containing alginate, foam, low-adherence and hydrocolloid dressing families.
    - Taxonomy evidence: Separately lists cadexomer-iodine preparations and povidone-iodine fabric dressings.
    - Taxonomy evidence: Lists honey sheet dressings and honey-based wound-dressing gels.
    - Taxonomy evidence: Lists Suprasorb X+PHMB as an antimicrobial dressing.
    - Taxonomy evidence: Lists chlorhexidine gauze dressings under antimicrobials.
    - Taxonomy evidence: Lists Cutimed Sorbact within antimicrobial wound-care products; this grouping does not establish chemical biocidal action.
    - Taxonomy evidence: Lists Flaminal Forte and Hydro among antimicrobial gels; enzyme-platform classification still requires separate support.
    - Taxonomy evidence: Lists Octenilin Wound Gel as an antimicrobial product; the page does not establish its octenidine ingredient or postoperative label.

18. NHS Supply Chain - Negative Pressure Wound Therapy
    - Taxonomy evidence: Procurement separates therapy equipment and pump rentals from NPWT consumables, supporting dressing-only accounting. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Taxonomy evidence: The framework covers vacuum dressings for surgical wounds and includes a distinct consumables lot; it does not establish the dressing value inside every integrated system.
19. FDA Product Classification - Wound Dressings Containing Oxygen
    - Taxonomy evidence: FDA product code SIL recognizes oxygen-containing wound dressings for external skin wounds. The category does not establish authorization in every country or actual postoperative sales. ([accessdata.fda.gov](https://www.accessdata.fda.gov/scripts/cdrh/cfdocs/cfPCD/classification.cfm?id=SIL))
20. OxyBand Technologies - FDA Clearance
    - Taxonomy evidence: The company's prescription oxygen-delivering dressing listing includes closed surgical incisions and skin-graft donor sites, corroborating a postoperative finished-dressing use case without establishing market size or comparative efficacy. ([oxyband.com](https://oxyband.com/Research/OxyBand-FDA.php))
21. MEDCU - Advanced Copper-Based Wound Dressings
    - Taxonomy evidence: The official US portfolio is explicitly presented as copper-based wound dressings. This establishes an own-product commercial category, not the completeness of the market partition or quantified postoperative demand. ([medcu.com](https://medcu.com/us/))
22. FDA K152970 - Dynarex Xeroform Petrolatum Dressing
    - Taxonomy evidence: The regulatory summary describes a bismuth-containing nonadherent gauze dressing with newly sutured and surgical-wound applications. It does not establish every bismuth dressing's antimicrobial claim. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf15/K152970.pdf))
    - Taxonomy evidence: The product is positioned as a primary contact layer, supporting role-based classification of qualifying low-adherence impregnated fabric.
23. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Taxonomy evidence: The May 2024 glossary distinguishes primary, secondary and tertiary healing, supporting three pathway concepts rather than a separate dehiscence sibling. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
    - Taxonomy evidence: Primary-intention healing is identified with surgical wound closure, establishing the closed-wound category's clinical identity. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
    - Taxonomy evidence: Secondary-intention healing includes open surgical wounds and dehisced wounds not subsequently closed surgically. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
    - Taxonomy evidence: Tertiary-intention healing is expressly identified as delayed surgical closure, supporting the awaiting-closure category. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
    - Taxonomy evidence: The postoperative pathway includes transfer between surgical teams, subsequent providers and supported self-management, establishing that final users extend beyond the operating institution. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
    - Taxonomy evidence: Supported postoperative self-management and patient-held dressing supplies are explicitly recognized; this establishes a household-use pathway, not its market share. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))

24. International Classification of Health Interventions (ICHI)
    - Taxonomy evidence: ICHI separates intervention Target, Action and Means and covers surgical interventions. This supports a procedure-based analytical axis; the proposed commercial groupings are an adaptation, not an official ICHI reproduction. ([who.int](https://www.who.int/standards/classifications/international-classification-of-health-interventions))
25. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
    - Taxonomy evidence: The appendix organizes surgery by body system. Its 2014 US hospital observations establish classification terminology, not Global 2025 dressing demand. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Identifies nervous-system operations, including peripheral-nerve procedures. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Separately identifies endocrine-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Separately identifies eye operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Identifies ear and nose, mouth and pharynx operation groups. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Separately identifies respiratory-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Separately identifies cardiovascular operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Separately identifies hemic and lymphatic operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Groups digestive operations and hernia repairs together. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Separately identifies urinary-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Separately identifies male genital-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Separately identifies female genital-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: Identifies musculoskeletal operations, including joint replacement, amputation and fusion. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
    - Taxonomy evidence: The integumentary group includes skin and breast operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))

26. Surgical Site Infection Event - January 2026
    - Taxonomy evidence: The January 2026 procedure categories corroborate distinct operative targets; surveillance categories are not adopted as the complete Global commercial taxonomy. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists craniotomy and ventricular-shunt surgery. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists thyroid and parathyroid surgery. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists thoracic surgery separately from cardiac procedures. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists cardiac, bypass, vascular and pacemaker operations. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists spleen surgery as a distinct operative category. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists digestive, hernia and exploratory-laparotomy categories. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists kidney surgery and transplantation. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists prostate surgery separately from kidney surgery. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists cesarean section separately from hysterectomy. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists fracture repair, joint prosthesis, amputation and spinal fusion. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Lists breast surgery as an operative category. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
    - Taxonomy evidence: Its procedure-level primary-closure flag can include partly closed incisions; it is not equivalent to current wound-level pathway allocation. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
27. FAQs: Surgical Site Procedure Codes
    - Taxonomy evidence: The January xx.xx 2026 FAQ retains hysterectomy procedures within gynecologic procedure categories even when abdominal incisions or laparoscopic access are involved. This corroborates keeping operative target separate from access location. ([cdc.gov](https://www.cdc.gov/nhsn/faqs/faq-ssi-proc-codes.html))
    - Taxonomy evidence: The hysterectomy examples demonstrate why an abdominal incision cannot by itself determine the principal surgical-application group. ([cdc.gov](https://www.cdc.gov/nhsn/faqs/faq-ssi-proc-codes.html))
28. Product Classification
    - Taxonomy evidence: FDA recognizes an eye-pad device category under product code HMP and regulation xx.xx. This establishes a dressing-category identity, not postoperative use for every eye pad. ([accessdata.fda.gov](https://www.accessdata.fda.gov/scripts/cdrh/cfdocs/cfPCD/classification.cfm?id=HMP))

29. Key classifications of the System of Health Accounts 2011 - Best Practice in Institutionalising Health Accounts

· Taxonomy evidence: The international provider classification distinguishes hospitals, residential care, ambulatory providers, home healthcare, retailers and households. It also separates provider classification from financing schemes, supporting exclusion of payers and resellers from this final-user axis. ([oecd.org](https://www.oecd.org/en/publications/best-practice-in-institutionalising-health-accounts_cf997130-en/full-report/key-classifications-of-the-system-of-health-accounts-2011_a2857acf.html))

· Taxonomy evidence: Medical practices, dental practices, healthcare practitioners and ambulatory centers are recognized provider groups, supporting the proposed outpatient/community aggregation. ([oecd.org](https://www.oecd.org/en/publications/best-practice-in-institutionalising-health-accounts_cf997130-en/full-report/key-classifications-of-the-system-of-health-accounts-2011_a2857acf.html))

· Taxonomy evidence: Households providing home healthcare are distinguished from professional provider establishments and medical-goods retailers. The proposed self-care boundary is a commercial adaptation. ([oecd.org](https://www.oecd.org/en/publications/best-practice-in-institutionalising-health-accounts_cf997130-en/full-report/key-classifications-of-the-system-of-health-accounts-2011_a2857acf.html))

30. A System of Health Accounts 2011

· Taxonomy evidence: The provider manual keeps integrated hospital ambulatory services within hospitals rather than freestanding ambulatory establishments. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2011/xx.xx/a-system-of-health-accounts_g1g13e12/xx.xx-en.pdf))

· Taxonomy evidence: HP.xx.xx.xx.xx identifies freestanding ambulatory surgery centers as specialized outpatient surgical establishments, distinct from hospitals and ordinary medical practices. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2011/xx.xx/a-system-of-health-accounts_g1g13e12/xx.xx-en.pdf))

· Taxonomy evidence: Residential nursing examples include nursing homes, skilled nursing facilities, convalescent homes and inpatient hospices, supporting the nonhospital residential/post-acute grouping. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2011/xx.xx/a-system-of-health-accounts_g1g13e12/xx.xx-en.pdf))

· Taxonomy evidence: HP.xx.xx identifies home-healthcare establishments, including community nurses, domiciliary nursing and home-healthcare agencies. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2011/xx.xx/a-system-of-health-accounts_g1g13e12/xx.xx-en.pdf))

31. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers

· Taxonomy evidence: The manual identifies surgical dressings among ASC facility services, establishing a direct institutional dressing-use role rather than a resale-only role. ([cms.gov](https://www.cms.gov/regulations-and-guidance/guidance/manuals/downloads/clm104c14.pdf))

· Taxonomy evidence: The manual separately recognizes surgical dressings furnished with physician-office services, supporting an office-based user category distinct from ASCs. ([edit.cms.gov](https://edit.cms.gov/Regulations-and-Guidance/Guidance/Manuals/Downloads/clm104c14.pdf))

· Taxonomy evidence: Postoperative dressings may subsequently be used by patients or family members and obtained from suppliers. The supplying drugstore and the household user therefore represent different commercial roles. ([edit.cms.gov](https://edit.cms.gov/Regulations-and-Guidance/Guidance/Manuals/Downloads/clm104c14.pdf))

32. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services

· Taxonomy evidence: The home-health manual explicitly identifies postoperative wound aftercare and dressing supplies within home-health services, establishing a professional home-care role. ([cms.gov](https://www.cms.gov/regulations-and-guidance/guidance/manuals/downloads/bp102c07.pdf))

· Taxonomy evidence: Its examples recognize overlapping family and professional wound-care participation. This supports retaining an explicit responsibility rule rather than classifying every home episode as household self-care. ([cms.gov](https://www.cms.gov/regulations-and-guidance/guidance/manuals/downloads/bp102c07.pdf))

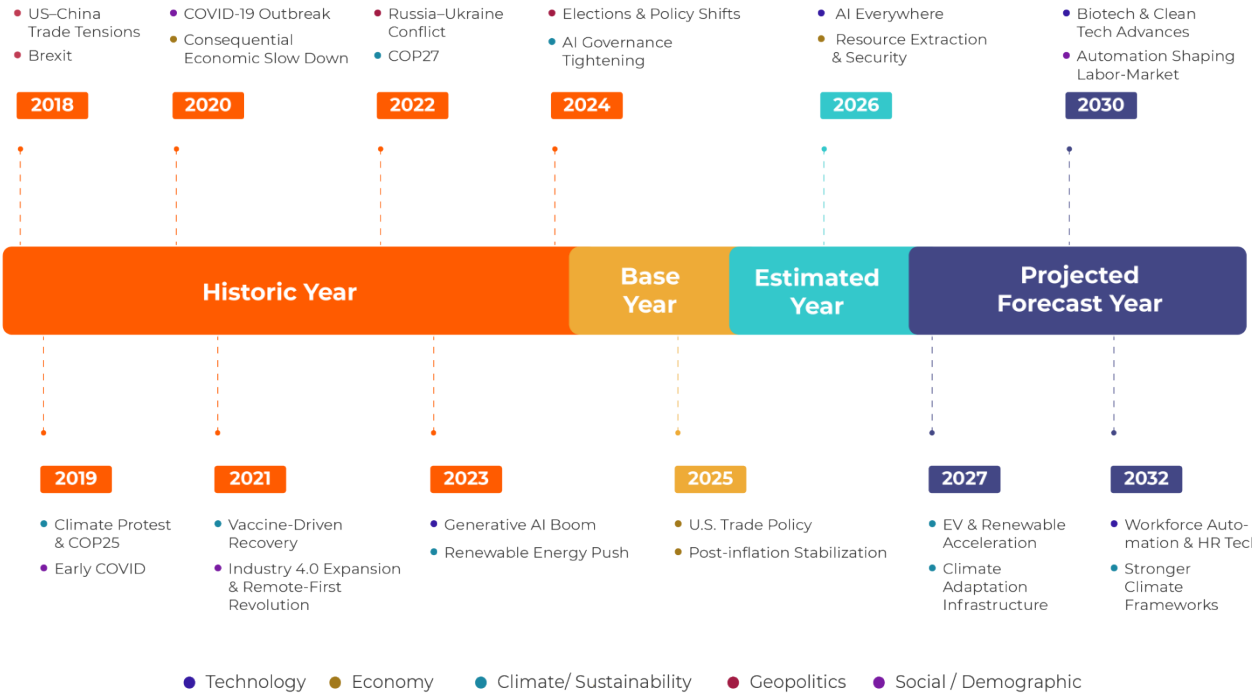
33. Sirona (BNSSG) Wound Management Formulary and Dressing Guide - Version 3, January 2025
    - Taxonomy evidence: The January 2025 public formulary lists surgical-wound dressings available for ordering by GP and practice-nurse teams, providing a market-specific outpatient purchasing-role anchor. It does not establish realized use volumes. ([remedy.bnssg.icb.nhs.uk](https://remedy.bnssg.icb.nhs.uk/media/ghxbkml3/sirona-wound-management-formulary-and-dressing-guide-jan-2025.pdf))
    - Taxonomy evidence: The same surgical-wound dressing section names nursing homes among permitted ordering organizations, independently establishing a residential-care purchasing role without inferring Global buyer shares. ([remedy.bnssg.icb.nhs.uk](https://remedy.bnssg.icb.nhs.uk/media/ghxbkml3/sirona-wound-management-formulary-and-dressing-guide-jan-2025.pdf))
34. Cataract surgery - After cataract surgery
    - Taxonomy evidence: The hospital's April 2026-reviewed information identifies an eye pad as a possible postoperative covering after cataract surgery, distinguishing that dressing use from shield-only coverage. This supports the ophthalmic application without implying universal pad use. ([guysandstthomas.nhs.uk](https://www.guysandstthomas.nhs.uk/health-information/cataract-surgery/after-cataract-surgery?utm_source=openai))
35. Advanced Wound Care
    - Taxonomy evidence: The September 2025-August 2027 framework publishes four total-fluid-handling bands in product listings. These are procurement classifications, not evidence of universal international adoption.
    - Taxonomy evidence: The published Low band is xx.xx-xx.xx g/xx.xx cm^2.
    - Taxonomy evidence: The published Moderate band is xx.xx-xx.xx g/xx.xx cm^2.
    - Taxonomy evidence: The published High band is xx.xx-xx.xx g/xx.xx cm^2.
    - Taxonomy evidence: The published Ultra-High band begins at xx.xx g/xx.xx cm^2.
    - Taxonomy evidence: The framework distinguishes supply routes from online ordering and offers commitment-dependent pricing. Neither ordering medium nor a pricing agreement alone identifies the first independent purchasing counterparty.
36. Surgical Dressings - Policy Article (A54563)
    - Taxonomy evidence: Surgical-dressing coding distinguishes wound covers with and without an adhesive border, independently of their wound-management material.
    - Taxonomy evidence: An adhesive-border wound cover has an integrated cover and distinct adhesive border around all sides. Coding uses pad dimensions rather than the outside border dimensions.
    - Taxonomy evidence: The surgical-dressing policy explicitly identifies contact-layer dressings as nonabsorptive, distinguishing them from a separate absorptive cover.
    - Taxonomy evidence: The policy recognizes both nonabsorptive contact layers and absorptive dressing categories. It does not supply a universal cross-material absorbency-band system.
37. Sandwell Area Formulary - Wound Management Products
    - Taxonomy evidence: The formulary distinguishes adhesive and nonadhesive foam offerings and separately describes bordered and nonbordered silicone-adhesive products.
    - Taxonomy evidence: The postoperative-eligible silicone-adhesive foam range is explicitly available in border and nonborder versions, establishing that borderlessness does not imply absence of adhesive.
    - Taxonomy evidence: The foam-dressing portfolio explicitly includes nonadhesive versions, supporting a separate no-integral-adhesive category rather than treating every borderless dressing as adhesive.

38. North American Industry Classification System - United States, 2022
    - Taxonomy evidence: The official classification distinguishes own-account merchants from agents that do not take title, and describes retailing as the final merchandise-distribution step. This supports transaction-role allocation rather than channel labels based on ordering technology.
    - Taxonomy evidence: NAICS xx.xx expressly includes surgical-dressing merchant wholesalers. Group purchasing organizations buying and selling on their own account are distinguished from agency-only organizations.
    - Taxonomy evidence: The classification separately recognizes pharmacies and health-product retailers, including convalescent-supply retailers. These establish retail intermediary roles, not Global postoperative-dressing shares.
39. Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Taxonomy evidence: The wound-care framework supports organizational purchasing, supplier awards and online ordering. Under its total-purchase route, dressings belong to the purchasing organization rather than the patient.
    - Taxonomy evidence: Organizational ownership can differ from patient delivery destination. Framework award terminology alone does not determine whether the counted principal sells directly or through a reseller.
40. Partnering with the NHS to Sell Goods and Services
    - Taxonomy evidence: Government commercial guidance distinguishes selling directly to healthcare providers from selling through supply-chain and collaborative purchasing arrangements.
    - Taxonomy evidence: The guidance expressly describes direct supplier sales to trusts and primary-care organizations, while noting that providers may buy from either manufacturers or distributors. Its historical procurement rules are not adopted as current Global requirements.
41. Medline Inc. - Form S-1 Registration Statement
    - Taxonomy evidence: The registration statement explicitly identifies the company's direct-to-consumer channel. This establishes a disclosed commercial model, not its postoperative-specific revenue, market-wide prevalence or Global share.
42. Consumer - Medline
    - Taxonomy evidence: The company's consumer-business page identifies wound-care products among home offerings and lists third-party pharmacy, general-retail and online-retail outlets. This supports observed retail participation, not an exhaustive market partition.
    - Taxonomy evidence: The same business page links its own consumer storefront alongside independent retail outlets, corroborating distinct own-storefront and reseller routes without establishing postoperative-specific sales.

1.4. Years Considered for the Study

The study spans 2024 through 2032. The designated historical year is 2024, the base year is 2025, the estimated year is 2026, and the forecast year and endpoint of the study horizon is 2032. These roles distinguish historical context, the base-period reference, estimated-year interpretation, and forward-looking analysis.

Figure 1. Global Post-Operative Wound Dressings Market, Years Considered for the Study



1.5. Currency Considered for the Study

Monetary reporting uses U.S. dollars (USD) on an absolute-value basis.

1.6. Language Considered for the Study

The study is published in American English.

1.7. Key Stakeholders

- Dressing manufacturers and therapy-platform offering owners: assess documented participation, portfolio fit, buyer requirements, and the capabilities needed to support an in-scope offering.
- Licensors, licensees, and commercial partners: assess territorial and offering-specific rights, retained responsibilities, and conditions affecting market access.
- Institutional purchasers and procurement organizations: evaluate qualification, contractual comparability, supply commitments, and switching conditions for Hospitals and Freestanding Surgical Centers.
- Clinical, nursing, and care-provider decision-makers: connect offering eligibility and purchasing requirements with the needs of Office-Based & Community Providers, Residential & Post-Acute Care Facilities, and Home Healthcare Providers.
- Wholesalers, distributors, retailers, and dispensing organizations: assess channel rights, customer eligibility, delivery responsibilities, and the distinction between distributing an offering and controlling its commercial rights.

- Self-Care Households and caregivers: understand purchasing routes, provider-linked access conditions, and the support responsibilities attached to an offering.
- Regulators, payers, and reimbursement authorities: distinguish legal product status, purchasing eligibility, and payment conditions within their respective jurisdictions.
- Investors and corporate development teams: assess whether documented offerings, business rights, and routes to buyers support a proposed acquisition, partnership, or market-entry rationale.

2. Research Methodology

2.1. Introduction

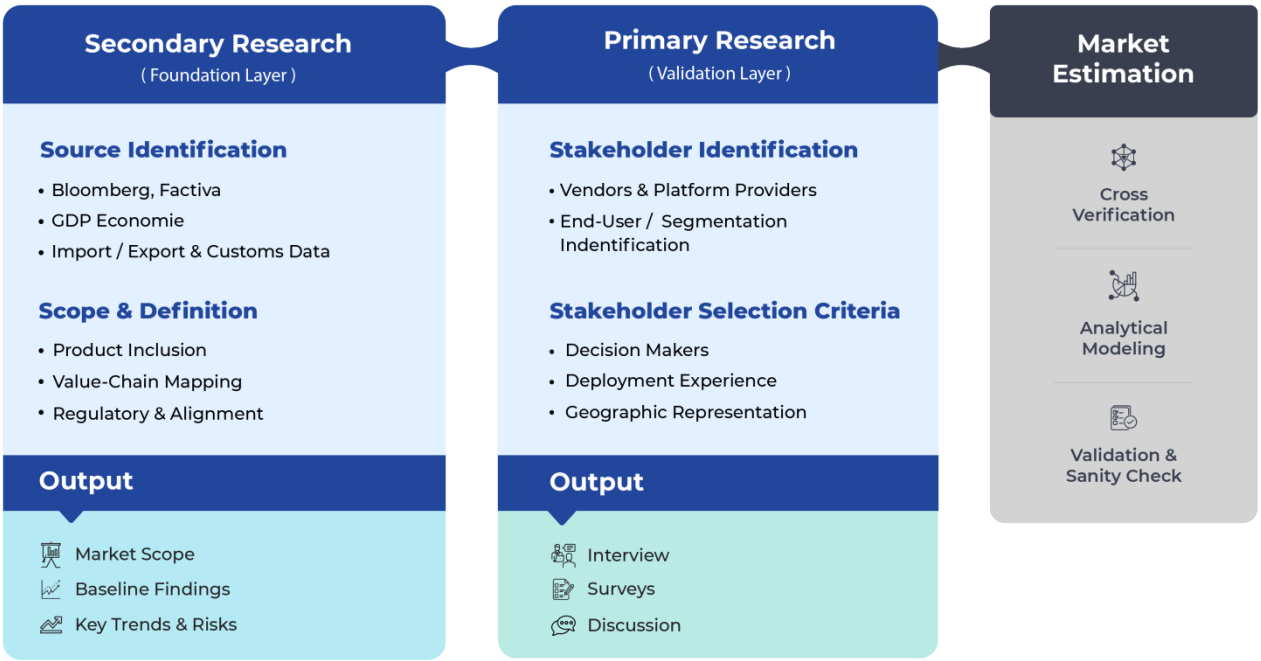
The study frames Post-Operative Wound Dressings as a commercial offering and market-access question across the accepted Global scope. It connects dressing and platform classifications with supplier participation, buyer qualification, business rights, channels, and purchasing choices. Commercial evidence provides the basis for observed conditions, while qualitative interpretation explains possible mechanisms and preserves the conditions that could change a conclusion.

2.2. Research Design

The design separates four questions: what offering belongs to the accepted market, who controls or supplies it, what commercial access is documented, and which buyer conditions govern its consideration. Inclusion of a dressing or platform category establishes study coverage, not the capability of a particular supplier or availability in a particular jurisdiction.

Comparisons are organized around identifiable offerings and supplier-to-buyer relationships across the accepted surgical pathways and care settings. Broader wound-care participation, an expert's organizational affiliation, and a product announcement cannot substitute for evidence addressing the specific commercial question.

Figure 2. Global Post-Operative Wound Dressings Market, Research Design



2.2.1. Primary Research

The analyst team conducted primary research as a qualitative challenge layer for market definition, segmentation, demand conditions, adoption barriers, and competitive interpretation. This work tested analytical assumptions and sharpened explanations of market mechanisms without serving as standalone support for numerical estimates.

The qualitative challenge layer is evaluated alongside secondary evidence within the accepted market scope. It informs conditional market explanations and hypotheses for subsequent quantitative analysis. Numerical estimates require their own supporting evidence, and a forecast derived from a qualitative assumption does not independently validate that assumption. Final interpretation must reconcile the qualitative findings with the completed quantitative results.

2.2.2. Secondary Research

Secondary evidence is assigned to the commercial fact it can establish. Official supplier portfolios can support named offerings; regulatory records can support authorization status and jurisdiction; company filings can support disclosed ownership and business operations; and public purchasing policies or awards can support stated procurement conditions. Licensing and channel materials can support commercial rights or delivery responsibilities where these are expressly described.

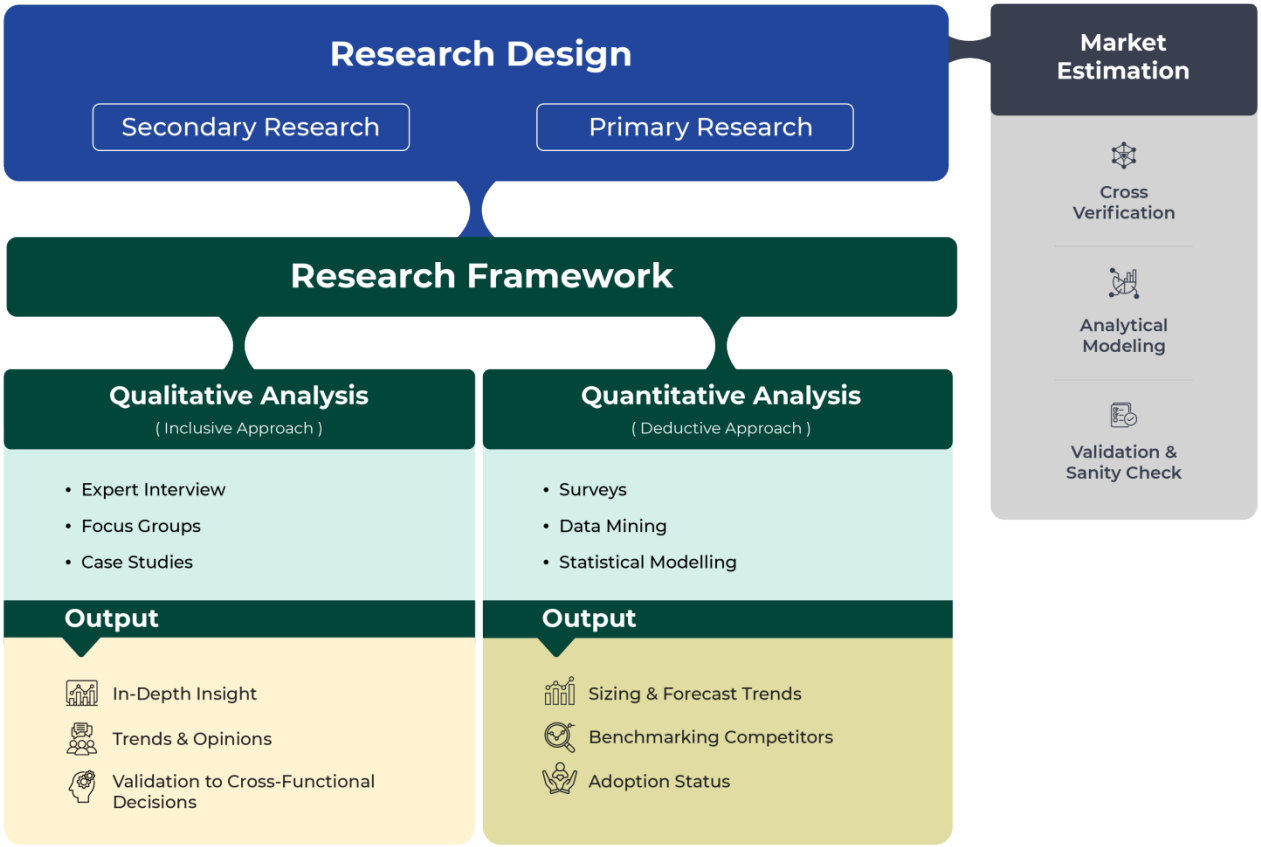
These source roles are complementary rather than interchangeable. An advertised offering does not establish continuing local availability, an authorization does not establish adoption, and a broader corporate disclosure does not establish post-operative participation for every product. Interpretation requires attention to the offering identity, effective period, territory, underlying authority, and scope of the claim.

2.3. Research Framework

The framework connects the market definition and accepted taxonomy to questions about supplier participation, offering identity, business rights, buyer access, and competition. The relevant supplier universe is defined through documented participation in in-scope offerings rather than membership in the wider wound-care industry.

Commercial interpretation then connects an offering to its buyer setting and route to market. Observed facts, economic explanations, and strategic options remain distinct: a proposed entry route or purchasing change must retain any unresolved authorization, licensing, qualification, or service condition on which it depends.

Figure 3. Global Post-Operative Wound Dressings Market, Research Framework



2.3.1. Qualitative Analysis

Qualitative analysis examines how Dressing Type, Therapy Platform, Antimicrobial Technology, Fixation Design, and Absorbency relate to commercial differentiation and buyer requirements. Healing Pathway, Surgical Application, End User, and Sales Channel provide context for interpreting qualification, access, switching, and delivery obligations. Category membership organizes the comparison; it does not establish interchangeability, clinical superiority, or a supplier's ability to satisfy a particular purchaser.

Economic explanations distinguish a documented commercial condition from its proposed effect on adoption, bargaining, or competitive choice. An interpretation remains conditional where the relevant purchasing requirement, contractual right, or delivery commitment has not been established.

2.3.2. Quantitative Analysis

The quantitative framework is bounded by the Global market, the designated historical, base, estimated, and forecast years, and reporting in USD on an absolute-value basis. The accepted segmentation axes provide independent classification lenses rather than additive opportunities. An offering classified by dressing material, therapy platform, antimicrobial technology, and end user remains part of the same commercial perimeter.

Any numerical attribution requires compatible offering scope, geography, period, and commercial relationship. A classification label or qualitative explanation cannot independently establish an allocation, and an estimate derived from an assumption cannot serve as independent confirmation of that assumption.

2.4. Market Size Estimation

The market-value question concerns activity attributable to the defined Global Post-Operative Wound Dressings market, not the whole wound-care industry, upstream materials, or downstream professional care. Any estimate must retain the accepted offering hierarchy, designated period roles, and USD absolute-value presentation. Dressing and platform relationships require compatible boundaries, while classification through several axes must not create duplicate attribution. Qualitative evidence informs interpretation but does not independently establish a numerical estimate.

2.4.1. Top-Down Approach

A top-down interpretation is defensible only where a broader business or wound-care disclosure can be related to the accepted post-operative offering boundary, geography, and period. A corporate or portfolio total is not equivalent to this market. It cannot establish attribution to a Dressing Type, Therapy Platform, or other category without support for the relevant boundary and allocation.

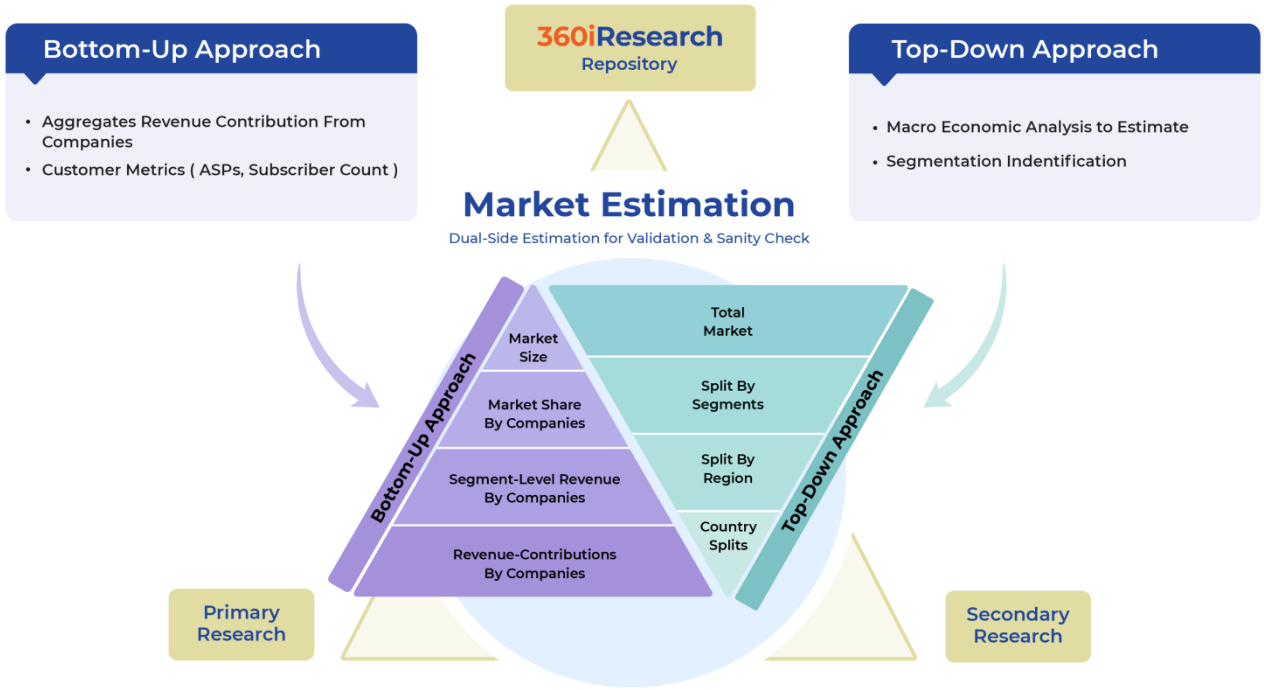
2.4.2. Bottom-Up Approach

A bottom-up interpretation requires offering-level or business-level evidence that can be attributed to the defined post-operative activity. The key boundary questions are whether an observation concerns a finished dressing, an accepted therapy-platform offering, or a broader business, and whether apparently separate records describe the same commercial activity. Supplier participation, channel presence, and category inclusion alone do not determine a numerical contribution.

2.5. Data Triangulation

Triangulation concerns consistency of commercial meaning as well as corroboration. An offering record, authorization, licensing statement, and purchasing record may describe different aspects of the same business relationship; one does not automatically confirm the others. Their interpretation requires matching the offering, territory, period, and stated commercial role. Where evidence conflicts, the affected conclusion must retain the unresolved condition rather than substitute a broader claim for the narrower fact.

Figure 4. Global Post-Operative Wound Dressings Market, Data Triangulation



2.6. Research Outcomes

The study is intended to help suppliers assess participation and market-access prerequisites, buyers distinguish comparable offerings and switching conditions, and investors evaluate whether commercial rights and delivery capabilities match the defined opportunity. Its decision value rests on separating documented offerings and relationships from conditional interpretations, with unresolved authorization, contractual, purchasing, or support requirements retained as conditions on a commercial commitment.

2.7. Research Assumptions

- The accepted dressing and therapy-platform categories remain in scope. Attribution of a particular offering to post-operative activity requires its own commercial support rather than a general wound-care label.
- The segmentation axes describe different attributes of the same market. Membership across Dressing Type, Therapy Platform, End User, and other axes does not represent separate additive activity.
- Global category inclusion does not imply uniform authorization, purchasing eligibility, reimbursement, or availability. Commercial choices remain conditional on the applicable jurisdiction and buyer.
- Shared material, antimicrobial, fixation, or absorbency classifications are not treated as proof of interchangeability. Switching conclusions require evidence relevant to the specific offerings and purchaser requirements.

- Where dressings and therapy-platform offerings are commercially linked, their distinct roles must be preserved without attributing a supplier's entire platform portfolio to post-operative wound dressings.

2.8. Research Limitations

- Where a disclosure combines surgical and nonsurgical applications, it cannot by itself establish the post-operative portion. Commercial comparisons must remain within the activity actually identified.
- A portfolio entry, announcement, or authorization establishes only its stated status and scope. It does not alone establish local purchasing, continuing availability, or buyer acceptance.
- Public business information may not settle exclusivity, territorial rights, renewal conditions, purchasing eligibility, or support obligations for a particular relationship. A commercial commitment remains conditional where an unresolved term is material.
- Evidence tied to one offering, surgical application, or buyer setting cannot automatically establish procurement eligibility or commercial acceptance in another. Cross-setting conclusions require support for the relevant setting.

3. Executive Summary

3.1. Introduction

Commercial advantage in the Global Post-Operative Wound Dressings market depends on matching a finished offering to an accepted surgical application and an accountable purchasing relationship, not on material or platform complexity alone. NHS wound-care arrangements illustrate the distinction: organized switching exposes suppliers to comparison, while NPWT consumables and equipment-access agreements follow separate routes. Buyers need qualified alternatives and continuity of the complete arrangement; suppliers need customer acceptance as well as an orderable product.

Adoption is selective rather than a uniform shift away from Standard Dressing Therapy. NICE's PICO assessment provides a risk-selected closed-incision purchasing rationale, but SUNRRISE did not show an infection-prevention advantage from routine incisional NPWT after emergency laparotomy. SWHSI-xx.xx separately found no clear healing-time benefit and an unfavorable cost-effectiveness result in its predominantly lower-limb, vascular-surgery secondary-intention population. These boundaries favor application-specific comparison and preserve standard dressings as a credible alternative rather than supporting all-surgery platform conversion.

Sources & Evidence

1. PICO negative pressure wound dressings for closed surgical incisions
   · NICE's PICO assessment emphasizes careful patient selection and recognizes variation by surgical application, supporting a bounded closed-incision purchasing interpretation. ([nice.org.uk](https://www.nice.org.uk/guidance/htg509/resources/pico-negative-pressure-wound-dressings-for-closed-surgical-incisions-pdf-xx.xx))
2. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2)
   · SWHSI-xx.xx found no clear healing-time benefit and found NPWT not cost-effective against usual care; participants predominantly had lower-limb wounds after vascular surgery. ([pubmed.ncbi.nlm.nih.gov](https://pubmed.ncbi.nlm.nih.gov/xx.xx/))
3. Advanced Wound Care and Lymphoedema Products and Services Framework Agreement | SBS10142
   · The NHS SBS framework describes multidisciplinary formulary selection and Tissue Viability team involvement for products outside the ordering system, distinguishing ordering access from customer acceptance. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
4. Advanced Wound Care
   · NHS Supply Chain supports dressing switching and mini-competitions, providing a documented mechanism for recurring supplier comparison. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/?utm_source=openai))
5. Negative Pressure Wound Therapy
   · Catalog consumable ordering is distinguished from direct equipment arrangements, including purchase, rental, and free-on-loan routes. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

6. Negative Pressure Dressings to Prevent Surgical Site Infection After Emergency Laparotomy: The SUNRRISE Randomized Clinical Trial
   · SUNRRISE found no surgical-site-infection advantage from routine incisional NPWT after emergency laparotomy, limiting transfer of a prevention proposition to that setting.
   ([jamanetwork.com](https://jamanetwork.com/journals/jama/fullarticle/xx.xx))

3.2. CXO Perspective

Provider executives should connect procurement to the budget and party responsible for continuation after discharge. Medicare bundles dressings furnished within a billed professional service, while eligible take-home supplies follow the applicable claims route. Solventum's US V.A.C. arrangement separately makes billing dependent on provider records. Hospitals and receiving suppliers should therefore assign eligibility resolution, documentation, replenishment, and equipment responsibilities before transfer; product selection alone cannot establish a funded continuation arrangement.

For offering owners and distributors, market-access investment should follow the actual customer interface rather than regional reach. HealthShare NSW assigns onward catalog publication to the contracted distributor where it supplies the customer; direct suppliers retain direct publication duties. A partner contributes access when it holds the relevant mandate and maintains that interface, at the cost of direct control. Direct supply remains an alternative where the owner can maintain those duties itself. Neither route justifies broad assortment or territorial commitments without accepted products and enforceable delivery responsibilities.

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   · Medicare includes dressings supplied within a billed professional service in that service's payment; take-home dressing claims follow the applicable benefit requirements.
   ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
2. V.A.C. Therapy patient support
   · Solventum states that missing provider documentation can prevent V.A.C. insurance billing and change equipment or personal-payment arrangements.
   ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
3. Procurement Services
   · HealthShare NSW assigns onward catalog publication to the contracted distributor where it supplies the customer; direct suppliers retain direct publication responsibilities.
   ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
4. Advanced Wound Care and Lymphoedema Products and Services Framework Agreement | SBS10142
   · Formulary-controlled ordering provides a documented reason to condition institutional channel investment on customer product acceptance.
   ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

3.3. New Revenue Opportunities

The assessed revenue routes are qualified institutional substitution for procurement and formulary teams, application-specific prevention where purchasers accept the evidence, accountable platform continuation for post-acute and home-care buyers, and rights-defined

own-label portfolio extension. Each depends on an accepted offering and a workable customer arrangement; none establishes universal replacement demand. The Opportunity Mapping section assesses these routes and specialist matrix access in detail. Dedicated Topical Oxygen Therapy and Bioelectric Wound Therapy channel commitments should remain deferred until the exact postoperative offering, territorial mandate, accountable seller, and applicable funding route are established.

Sources & Evidence

1. Buy Products
   · Vomaris identifies an exclusive Arthrex JumpStart route for specified surgical specialties alongside a separate professional Procellera inquiry route; the page does not settle every territorial or funding condition. ([vomaris.com](https://vomaris.com/buy-products))
2. PICO negative pressure wound dressings for closed surgical incisions
   · The assessment's patient-selection and surgical-application boundaries constrain a universal prevention opportunity interpretation. ([nice.org.uk](https://www.nice.org.uk/guidance/htg509/resources/pico-negative-pressure-wound-dressings-for-closed-surgical-incisions-pdf-xx.xx))
3. V.A.C. Therapy patient support
   · The US V.A.C. patient relationship includes replenishment, support, and documentation-dependent billing, supporting an accountable-continuation proposition rather than portability alone. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
4. Topical Oxygen Therapy (L37873)
   · Palmetto GBA's identified LCD specifies topical-oxygen noncoverage within its stated service and jurisdictional scope; it does not establish every oxygen-dressing or payer outcome. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?lcdid=xx.xx))
5. Advanced Wound Care and Lymphoedema Products and Services Framework Agreement | SBS10142
   · The formulary and exception arrangements identify procurement and clinical-selection constituencies that gate institutional substitution. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
6. Advanced Wound Care
   · The framework's switching arrangements support a conditional institutional substitution route, not automatic customer acceptance. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/?utm_source=openai))
7. Ways of Working - OEM
   · AMS advertises finished-goods OEM supply for portfolio extension and gap filling; this establishes a business capability rather than partner-specific postoperative rights. ([admedsol.com](https://admedsol.com/capabilities/ways-of-working-oem/))
8. Foam Dressing - Wound Care Range - ActivHeal Foam
   · ActivHeal Foam Adhesive and Foam Non-Adhesive identify postoperative surgical applications, establishing a named branded alternative to a separately negotiated own-label route. ([activheal.com](https://activheal.com/wound-care-dressing-range/foam-dressing/))

3.4. Next-Generation Business Models

Advanced Medical Solutions Group plc's advertised finished-goods OEM route supports a conditional choice between own-label portfolio extension and an existing ActivHeal offering. Brand control brings agreement-specific supply dependence, rights, authorization, and

customer-acceptance obligations; the branded product's purchasing status does not automatically transfer. Own-label entry is defensible only where confirmed postoperative availability and customer needs justify those added commitments.

Co-promotion separates customer reach from product ownership. Mölnlycke Health Care's exclusive US post-acute Endoform agreement, effective October xx.xx 2026, adds a promotional interface while Aroa Biosurgery Limited retains ownership and supply responsibility. Providers should confirm the purchasing contact, eligible configuration, and payer conditions before conversion. The relationship establishes a commercial model, not demonstrated postoperative adoption or transferred fulfillment accountability.

Sources & Evidence

1. Ways of Working - OEM
   · The advertised finished-goods OEM model supports a conditional own-label route; exact product availability and customer-specific rights require an agreement. ([admedsol.com](https://admedsol.com/capabilities/ways-of-working-oem/))
2. Foam Dressing - Wound Care Range - ActivHeal Foam
   · The existing ActivHeal postoperative foam offerings support comparison with branded procurement; their product identity does not establish purchasing acceptance for a future OEM customer's version. ([activheal.com](https://activheal.com/wound-care-dressing-range/foam-dressing/))
3. Endoform | AROA
   · AROA identifies surgical applications for Endoform, qualifies country availability and licensed indications, and expressly does not guarantee payer coverage. ([aroa.com](https://aroa.com/product/endoform/))
4. Mölnlycke and AROA Partner to Expand Access to Endoform in the US
   · The exclusive US post-acute Endoform co-promotion agreement is effective October xx.xx 2026; AROA retains ownership and continues distribution and supply. ([molnlycke.com](https://www.molnlycke.com/en-my/news/molnlycke-news/news---molnlycke-and-aroa-partner-to-expand-access-to-endoformtm-in-the-us/))

3.5. Industry Roadmap

During 2026-2027, sequence commitments around operative contracts and active offerings. The published NHS NPWT framework ends March xx.xx 2027; Advanced Wound Care states August xx.xx 2027, with an extension option. Formal continuation or replacement notices, not the option alone, should govern commitments beyond those arrangements.

During 2028-2029, affected Great Britain suppliers should resolve certificate-specific continuation or an accepted replacement before extending customer commitments. Published guidance limits qualifying legacy-directive general devices to the earlier applicable certificate expiry or June xx.xx 2028, subject to stated exceptions. Other routes and Northern Ireland differ; consultation on indefinite CE recognition is not an enacted extension.

During 2030-2032, international expansion should combine eligible documentation reuse with explicit destination-level accountability. MDSAP offers a shared-audit mechanism, while Brazil requires a legally constituted domestic partner for foreign companies' authorization arrangements. Reusable records do not consolidate product access, local mandates, or purchasing authority. Changes in authority acceptance and executed partner responsibilities, rather than presumed harmonization, are the relevant commitment triggers.

Sources & Evidence

1. Advanced Wound Care

   · The stated expiry is August xx.xx 2027, with an option to extend; the option is not confirmation of an extension.
   ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/?utm_source=openai))

2. Medical devices

   · Anvisa states that foreign companies require legally constituted Brazilian partners responsible for imported and distributed products rather than obtaining marketing authorizations directly.
   ([gov.br](https://www.gov.br/anvisa/en/regulation-of-products/medical-devices))

3. Medical Device Single Audit Program (MDSAP)

   · MDSAP permits a recognized organization to conduct a single regulatory audit addressing participating authorities' relevant requirements; this is an audit mechanism rather than a common purchasing authorization.
   ([fda.gov](https://www.fda.gov/medical-devices/cdrh-international-affairs/medical-device-single-audit-program-mdsap))

4. Regulating medical devices in the UK

   · Great Britain guidance limits qualifying legacy-directive general devices to the earlier applicable certificate expiry or June xx.xx 2028, subject to stated exceptions. Other routes differ, and the announced consultation on indefinite CE recognition is not an enacted extension.
   ([gov.uk](https://www.gov.uk/guidance/regulating-medical-devices-in-the-uk))

5. Negative Pressure Wound Therapy

   · The published NPWT framework ends March xx.xx 2027.
   ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

4. Market Overview

4.1. Introduction

The Global Post-Operative Wound Dressings market combines finished dressing offerings with the accepted Standard Dressing Therapy, Negative Pressure Wound Therapy, Topical Oxygen Therapy, and Bioelectric Wound Therapy categories. Established product catalogs coexist with application-specific platform decisions: Convatec lists AQUACEL SURGICAL for postoperative incisions, Arthrex lists JumpStart for surgical-incision management, and NHS purchasing arrangements distinguish NPWT equipment from associated consumables. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪

Commercial participation is offering- and jurisdiction-specific. ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ Across Closed Surgical Wounds, Open Wounds Healing by Secondary Intention, and Open Wounds Awaiting Surgical Closure, the relevant business boundary is the documented offering, its permitted application, and the buyer relationship-not the supplier's entire wound-care portfolio.

Figure 5. Global Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million, Growth %)

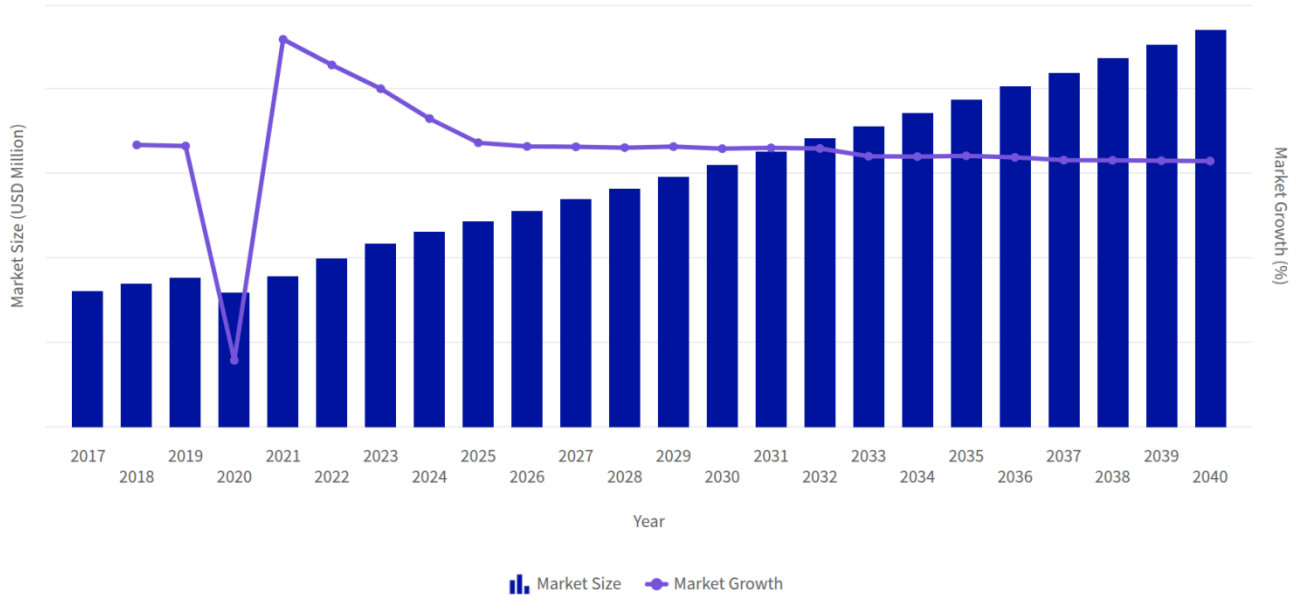


Table 2. Global Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million, Growth %)

Metric	2017	2024	2025	2026	2027	2032	2040
Market Size (USD Million)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Market Growth (%)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. AQUACEL SURGICAL cover dressing

   · Convatec's UK portfolio identifies AQUACEL SURGICAL as a postoperative surgical-incision offering. ([convatec.com](https://www.convatec.com/en-gb/products/advanced-wound-care/wound-type/pc-wound-closed-surgical-solutions/aquacel-surgical-cover-dressing/))

2. JumpStart Antimicrobial Wound Dressing

   · Arthrex lists JumpStart as an offering for surgical-incision management. ([arthrex.com](https://www.arthrex.com/orthobiologics/jumpstart))

3. Convatec Australia Pty Ltd - AQUACEL Ag Surgical Cover Dressing - Dressing, hydrophilic gel-forming (216814)

   · ARTG entry xx.xx identifies AQUACEL Ag Surgical Cover Dressing, Convatec Australia Pty Ltd as sponsor, and Convatec Limited as manufacturer. ([tga.gov.au](https://www.tga.gov.au/resources/artg/xx.xx))

4. Negative Pressure Wound Therapy

   · The framework distinguishes NPWT equipment and related consumables. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy))

5. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

6. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

7. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

8. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

9. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

10. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

11. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
    - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.
12. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

4.2. Key Growth Contribution

Risk-selected complication prevention can support adoption of differentiated closed-incision dressings when an institution values the consequences across the care episode. NICE's PICO guidance provides a defined purchasing rationale, requiring an application-relevant proposition and an accepted supply route. A high-risk label alone is insufficient: SUNRRISE found no infection-prevention advantage from routine PICO xx.xx use after emergency laparotomy. Suppliers therefore need buyer-approved use cases and accountable commercial support; standard dressings remain a counterforce to indiscriminate platform substitution.

Figure 6. Global Post-Operative Wound Dressings Market, Key Growth Contribution, by Region, 2025-2032 (USD Million)

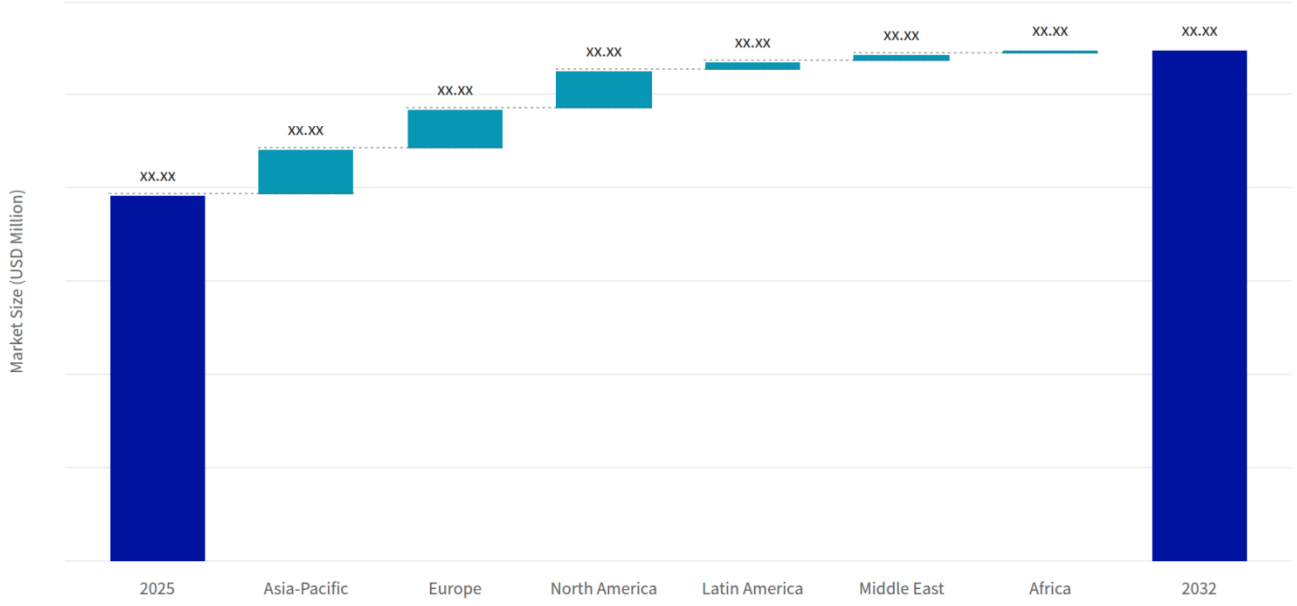


Figure 7. Global Post-Operative Wound Dressings Market, Key Growth Contribution, by Country, 2025-2032 (CAGR %)

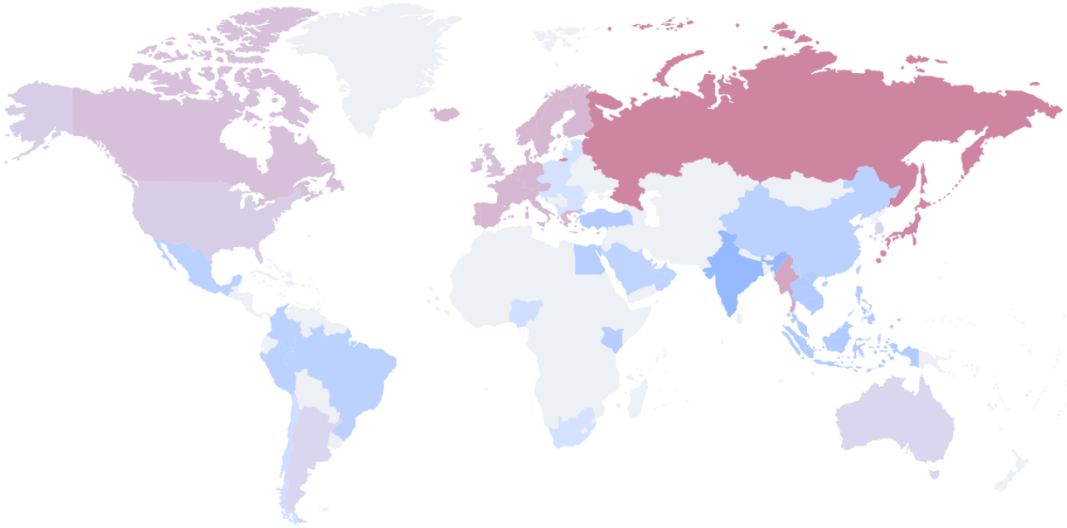


Table 3. Global Post-Operative Wound Dressings Market, Key Growth Contribution, 2025-2032

Scope	Leading Category	Added Market Size (USD Million)	Growth Share (%)	CAGR (%)
Absorbency	xx.xx	xx.xx	xx.xx	xx.xx
Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx
Country	xx.xx	xx.xx	xx.xx	xx.xx
Dressing Type	xx.xx	xx.xx	xx.xx	xx.xx
End User	xx.xx	xx.xx	xx.xx	xx.xx
Fixation Design	xx.xx	xx.xx	xx.xx	xx.xx
Healing Pathway	xx.xx	xx.xx	xx.xx	xx.xx
Region	xx.xx	xx.xx	xx.xx	xx.xx
Sales Channel	xx.xx	xx.xx	xx.xx	xx.xx
Surgical Application	xx.xx	xx.xx	xx.xx	xx.xx
Therapy Platform	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. PICO negative pressure wound dressings for closed surgical incisions

   · NICE supports considering PICO for selected high-risk closed surgical incisions. ([nice.org.uk](https://www.nice.org.uk/guidance/htg509/resources/pico-negative-pressure-wound-dressings-for-closed-surgical-incisions-pdf-xx.xx))

2. Negative Pressure Dressings to Prevent Surgical Site Infection After Emergency Laparotomy: The SUNRRISE Randomized Clinical Trial
   - SUNRRISE used PICO xx.xx and found no surgical-site-infection advantage from routine application after emergency laparotomy. ([jamanetwork.com](https://jamanetwork.com/journals/jama/fullarticle/xx.xx))
3. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
4. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

5. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
6. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
7. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

8. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
9. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

11. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
12. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

13. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

14. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
15. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

16. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

17. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

18. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
19. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
20. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
21. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
22. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
23. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

24. Convatec 2025 Annual Results Transcript - 24 February 2026
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.

25. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.

26. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.

27. FDA K143124 - KA01 Chitosan Wound Dressing
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.

28. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

29. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
30. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
31. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
32. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

33. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
34. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
35. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

36. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
37. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

38. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
39. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
40. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
41. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
42. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
43. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
44. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

45. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
46. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
47. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
48. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

49. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
50. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

51. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
52. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

53. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

54. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

55. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
56. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
57. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
58. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

59. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

60. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
61. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
62. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
63. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

64. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
65. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

66. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

67. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

68. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

69. Medline - Consumer
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
70. Solventum Corporation - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
71. PowerHeal Bandage - Shop
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))
72. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.

73. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
74. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
75. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
76. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.

77. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
78. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

4.3. Industry Ecosystem & Value Chain Analysis

[redacted] The procurement decision therefore allocates equipment access, replenishment responsibility, and contractual obligations as well as selecting a dressing. A free-on-loan label should not be interpreted as eliminating the commercial obligations of the overall arrangement.

[redacted] Separately sourcing components may offer flexibility, but only where the authorized product relationship and

service responsibilities remain acceptable to the customer. The framework summaries do not establish universal exclusivity or interoperability.

Sources & Evidence

1. Negative Pressure Wound Therapy
   · Consumables use catalog routes; equipment arrangements include purchase, rental, and free-on-loan options.
   ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy))
2. Medical support
   · Solventum advertises continuous US V.A.C. support and supply-ordering assistance.
   ([solventum.com](https://www.solventum.com/en-us/home/medical/support/))

4.3.1. Supply-Side Analysis

A contract award and an active offering are different supply-side facts. The NHS NPWT framework identifies GB UK Healthcare as awarded but without listed products and records Medela UK Ltd as delisted after exiting the market. ■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■ ■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■

Channel rights can differ within a technology family. ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ The relevant commercial questions are the permitted field, territory, contracting party, and remaining customer approvals; the public offering pages do not settle every contractual term.

Sources & Evidence

1. JumpStart Antimicrobial Wound Dressing
   · The distributor's own portfolio independently identifies the JumpStart surgical offering.
   ([arthrex.com](https://www.arthrex.com/orthobiologics/jumpstart))
2. Negative Pressure Wound Therapy
   · The supplier section distinguishes GB UK Healthcare's award without listed products and Medela UK Ltd's delisting.
   ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy))
3. Buy Products
   · Vomaris distinguishes professional prescription inquiries from the exclusive Arthrex JumpStart route for specified surgical specialties. ([vomaris.com](https://vomaris.com/buy-products/))

4.3.2. Demand-Side Analysis

The party selecting a postoperative dressing is not necessarily the party bearing its cost. ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■ ■■■■ ■■ ■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■

[redacted] A facility's product choice should not be treated as confirmation of covered replenishment after discharge.

For differentiated closed-incision products, the purchasing question can extend beyond acquisition expense to the consequences of complications. NICE's PICO recommendation provides a risk-selected example, but its economic conclusion is modeled rather than a guarantee for each institution. [redacted]

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   · Professional-service dressings are not separately payable; eligible take-home supplies may be claimed under applicable requirements.
   ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
2. PICO negative pressure wound dressings for closed surgical incisions
   · NICE recommends considering PICO for high-risk closed surgical incisions and presents a modeled whole-treatment economic conclusion.
   ([nice.org.uk](https://www.nice.org.uk/guidance/htg509/resources/pico-negative-pressure-wound-dressings-for-closed-surgical-incisions-pdf-xx.xx))
3. V.A.C. Therapy patient support
   · Solventum identifies prescription and clinical-information requirements affecting insurance billing for continuing V.A.C. therapy.
   ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

4.3.3. Stakeholder Analysis

Clinical, payment, and supply authority remain distributed. Treating professionals provide the orders and supporting records, payers determine eligibility, and the supplying business carries fulfillment and claims responsibilities. [redacted]

Self-Care Households are participants in the market, but consumer access does not remove professional oversight or claim restrictions. [redacted] The permission establishes the scope of specified advertising representations, not adoption or equivalence with another offering.

Sources & Evidence

1. Negative Pressure Wound Therapy - Medicare Provider Compliance Tips
   · CMS illustrates payment recoupment following insufficient NPWT documentation. ([cms.gov](https://www.cms.gov/training-education/medicare-learning-networkr-mln/compliance/medicare-provider-compliance-tips/negative-pressure-wound-therapy))
2. Procurement Services
   · HealthShare NSW assigns catalog-publication responsibilities according to the direct or contracted distributor relationship. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
3. Molnlycke Health Care Pty Ltd - Adhesive bandage
   · The TGA permission allows specified Mepilex Border Post Op consumer representations accompanied by healthcare-professional-supervision statements. ([tga.gov.au](https://www.tga.gov.au/resources/advertising-permissions/molnlycke-health-care-pty-ltd-adhesive-bandage))

4.4. Market Dynamics

[illegible] Support for complication prevention in one pathway does not establish an economic advantage for accelerated healing in another. Selective adoption and continued use of standard dressings can therefore coexist without contradiction.

Commercial differentiation is also filtered through the organization paying for care and the channel fulfilling it. A provider may accept an offering while the subsequent supply relationship still requires separate coverage, documentation, and purchasing approval. [illegible]

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   · The benefit and payment distinctions support the synthesis of setting-dependent commercial access. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
2. PICO negative pressure wound dressings for closed surgical incisions
   · The recommendation is risk-selected and specific to closed surgical incisions. ([nice.org.uk](https://www.nice.org.uk/guidance/htg509/resources/pico-negative-pressure-wound-dressings-for-closed-surgical-incisions-pdf-xx.xx))
3. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2)
   · The 2025 SWHSI-xx.xx publication reports no clear healing-time benefit and finds NPWT not cost-effective against usual care in the studied population. ([pubmed.ncbi.nlm.nih.gov](https://pubmed.ncbi.nlm.nih.gov/xx.xx/))

4.4.1. Key Drivers

4.4.1.1. Risk-selected complication prevention supports differentiated purchasing

Risk-selected prevention creates a differentiated purchasing rationale for closed-incision offerings. NICE recommends considering PICO for people at high risk of surgical-site infection and describes a modeled whole-treatment economic case. ■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. PICO negative pressure wound dressings for closed surgical incisions
   - The recommendation supports targeted procurement, not universal replacement of standard dressings. ([nice.org.uk](https://www.nice.org.uk/guidance/htg509/resources/pico-negative-pressure-wound-dressings-for-closed-surgical-incisions-pdf-xx.xx))

4.4.1.2. Supported portable offerings enable continuity beyond the surgical facility

Portable NPWT purchasing options and documented patient-support commitments make continuation outside the surgical facility commercially feasible. ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ These arrangements can support adoption where the receiving provider and payer accept the pathway; portability alone does not establish a funded or adequately supported home-care arrangement.

Sources & Evidence

1. Negative Pressure Wound Therapy
   - Portable pumps are a stated framework category. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy))
2. Medical support
   - The documented support commitment supports fulfillment analysis, not an inference of adoption or outcomes. ([solventum.com](https://www.solventum.com/en-us/home/medical/support/))

4.4.1.3. Purchasing-system integration enables institutional ordering

Integration into the buyer's purchasing infrastructure can turn an eligible dressing into an orderable offering. HealthShare NSW uses the National Product Catalogue and assigns publication responsibilities according to the direct or distributor supply relationship. ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■ ■■■ ■■ ■■■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. Procurement Services
   - NSW Health purchasing uses the National Product Catalogue; supplier information responsibilities accompany that route. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

4.4.2. Key Restraints

4.4.2.1. Payer eligibility separates product availability from funded access

[illegible] Separately, Palmetto GBA's topical-oxygen LCD specifies noncoverage within its listed jurisdictions, not a universal US rule. Suppliers must establish the applicable benefit and payer decision before treating an authorized offering as a reimbursable postoperative sale.

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   - Coverage requires both a qualifying wound and an eligible dressing. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
2. Surgical Dressings (L33831)
   - The LCD applies dressing-type and material-based coverage conditions; antimicrobial classification alone does not establish payment eligibility. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?lcdid=xx.xx))
3. Topical Oxygen Therapy (L37873)
   - Palmetto GBA's LCD specifies topical-oxygen noncoverage within its listed jurisdictions and describes local-contractor coverage authority. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?lcdid=xx.xx))

4.4.2.2. Application-specific evidence constrains broad substitution claims

Evidence cannot be transferred automatically between healing pathways. SWHSI-xx.xx found no clear healing-time benefit and found NPWT not cost-effective against usual care in its predominantly lower-limb, vascular-surgery population. [illegible]

Sources & Evidence

1. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2)
   - Participants predominantly had lower-limb wounds arising after vascular surgery; wider transfer requires qualification. ([pubmed.ncbi.nlm.nih.gov](https://pubmed.ncbi.nlm.nih.gov/xx.xx/))

4.4.2.3. Organized purchasing exposes suppliers to recurring substitution pressure

NHS Supply Chain supports switching and mini-competitions in specified dressing classes. [illegible]

■■■■■■■■■■■■■ A specialty offering can retain a distinct proposition where the purchaser accepts its application-specific evidence, but framework membership alone does not establish that advantage.

Sources & Evidence

1. Advanced Wound Care
   · The framework supports product switching and mini-competitions in specified dressing classes. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care))

4.4.3. Key Opportunities

4.4.3.1. Account-ready alternatives for controlled institutional substitution

Institutional substitution creates an opportunity for suppliers that can provide a comparable finished offering with an active purchasing identity and an accountable seller. ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ The opportunity is to reduce qualification and ordering friction, not to infer interchangeability from a material label; customer acceptance and delivery remain necessary.

Sources & Evidence

1. Procurement Services
   · HealthShare NSW assigns catalog-publication responsibilities according to the actual direct or contracted-distributor relationship. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
2. Advanced Wound Care
   · The framework supports product switching and qualified purchasing comparison. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/))

4.4.3.2. Accountable continuation across discharge

Post-discharge platform supply creates a need for an accountable commercial handoff. ■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ Providers and receiving suppliers can address that need by allocating records, replenishment, support, and payment-resolution duties before transfer, provided the actual product, payer, and equipment relationship permit continuation.

Sources & Evidence

1. Medical support
   · Solventum advertises continuing US V.A.C. support and supply-ordering assistance. ([solventum.com](https://www.solventum.com/en-us/home/medical/support/))
2. V.A.C. Therapy patient support
   · Solventum identifies provider-documentation dependencies for V.A.C. insurance billing. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

4.4.3.3. Rights-defined own-label portfolio extension

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offering, territorial rights, applicable authorization, customer acceptance, and supply commitments. An existing accepted branded product remains the alternative where own-label control does not justify those additional obligations.

Sources & Evidence

1. Ways of Working - OEM
   · AMS advertises finished-goods OEM supply for portfolio extension and gap filling. ([admedsol.com](https://admedsol.com/capabilities/ways-of-working-oem/))

4.4.4. Key Challenges

4.4.4.1. Documentation handoffs can interrupt an otherwise eligible supply relationship

[redacted] CMS also illustrates recoupment following insufficient documentation. The execution challenge is an accountable administrative handoff, not merely delivery of a portable product.

Sources & Evidence

1. V.A.C. Therapy patient support
   · The patient page states that missing medical data can prevent insurance billing and change payment responsibility. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
2. Negative Pressure Wound Therapy - Medicare Provider Compliance Tips
   · The compliance example establishes a payment consequence of inadequate records, not a postoperative adoption measure. ([cms.gov](https://www.cms.gov/training-education/medicare-learning-networkr-mln/compliance/medicare-provider-compliance-tips/negative-pressure-wound-therapy))
3. Negative Pressure Wound Therapy Pumps (L33821)
   · The NPWT LCD requires appropriate written orders, proof of delivery, and documented affirmative refill requests. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?LCDid=xx.xx))

4.4.4.2. Local resilience commitments create obligations beyond product supply

NHS Supply Chain's Advanced Wound Care framework calls for UK warehouse stock and forward planning to improve resilience. [redacted] The appropriate commitment depends on the executed customer agreement and replenishment responsibilities.

Sources & Evidence

1. Advanced Wound Care
   · Resilience measures include UK warehouse stock and forward planning. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care))

4.4.4.3. Cross-market qualification requires aligned but noninterchangeable records

Commercial qualification must stay aligned across intended-use claims, quality-system obligations, and purchasing records. European classification guidance, the US QMSR, and HealthShare NSW's catalog responsibilities govern different parts of that relationship. ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■ ■■■■■■■

Sources & Evidence

1. Procurement Services
   · Purchasing-record responsibilities are distinct from product authorization and product evaluation. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
2. MDCG 2021-24 Rev.1 - Guidance on classification of medical devices
   · The April 2026 guidance makes wound-dressing classification dependent on intended use and applicable special rules. ([health.ec.europa.eu](https://health.ec.europa.eu/system/files/2021-xx.xx/mdcg_2021-24_en_0.pdf))
3. Quality Management System Regulation (QMSR)
   · The QMSR applies to finished-device manufacturers within its stated scope and incorporates ISO xx.xx:2016. ([fda.gov](https://www.fda.gov/medical-devices/postmarket-requirements-devices/quality-management-system-regulation-qmsr))

4.5. Porter’s Five Forces Analysis

Buyer leverage is strongest where an institution can choose among qualified alternatives through an established purchasing arrangement. The NHS Supply Chain NPWT framework lists competing suppliers and several equipment-access models. ■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■ ■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■

Entry barriers combine regulatory obligations, intellectual-property rights, and fulfillment capability. ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■ An entrant must establish its own commercial rights and purchasing eligibility; a distributor relationship does not itself resolve those requirements.

Substitution can occur between standard dressings and therapy platforms as well as between suppliers. The SWHSI-xx.xx findings preserve a credible standard-dressing alternative for the

lower-limb secondary-intention population studied. ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■

Sources & Evidence

1. Negative Pressure Wound Therapy
   · Named competing suppliers and alternative equipment-access models support a bounded buyer-choice analysis.
   ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy))
2. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2)
   · The comparative findings support a bounded standard-dressing substitute analysis.
   ([pubmed.ncbi.nlm.nih.gov](https://pubmed.ncbi.nlm.nih.gov/xx.xx/))
3. MDCG 2021-24 Rev.1 - Guidance on classification of medical devices
   · A material or dressing-type label cannot by itself determine the applicable regulatory class.
   ([health.ec.europa.eu](https://health.ec.europa.eu/system/files/2021-xx.xx/mdcg_2021-24_en_0.pdf))
4. Solventum Corporation - 2025 Form 10-K
   · Solventum discloses reliance on proprietary rights, including patents, and third-party licensing. This does not establish a specific postoperative patent barrier.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4.6. PESTLE Analysis

Trade policy and macroeconomic exposure affect fulfillment economics without creating a uniform tariff outcome for Post-Operative Wound Dressings. ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■ ■■■■ ■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■ ■■ ■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ Buyers and distributors should establish product origin, contractual responsibility for duties, and delivery commitments before assuming that an existing sourcing arrangement will preserve its economics.

Regulatory treatment follows the offering's intended use rather than its material name alone. The European Commission's April 2026 classification guidance distinguishes wound-dressing classes according to intended purpose and applicable special rules. ■■ ■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■

Environmental and social requirements can determine purchasing eligibility independently of a dressing's clinical proposition. NHS Supply Chain's Advanced Wound Care framework incorporates carbon-reduction, modern-slavery, sustainability-assessment, and social-value requirements. ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■ ■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■

[redacted]

Sources & Evidence

1. Advanced Wound Care
   · Supplier requirements include carbon reduction, sustainability assessment, modern slavery, and social value. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care))
2. MDCG 2021-24 Rev.1 - Guidance on classification of medical devices
   · The guidance distinguishes classes according to intended purpose rather than treating all wound dressings alike. ([health.ec.europa.eu](https://health.ec.europa.eu/system/files/2021-xx.xx/mdcg_2021-24_en_0.pdf))
3. Quality Management System Regulation (QMSR)
   · The FDA states that the QMSR became effective on February xx.xx 2026, aligning quality-system requirements with international standards. ([fda.gov](https://www.fda.gov/medical-devices/postmarket-requirements-devices/quality-management-system-regulation-qmsr))
4. Solventum Corporation - 2025 Form 10-K
   · The 2025 filing attributes MedSurg cost pressure partly to tariffs, logistics, and 3M supply arrangements; its scope is not a dressing-specific tariff schedule. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4.7. Market Outlook

[redacted] Organized NHS switching provides a counterforce to unsupported differentiation, while the Endoform co-promotion relationship illustrates how selling reach can change without transferring supply accountability. The meaningful catalysts are buyer acceptance, an operative mandate, and a funded, deliverable arrangement-not portfolio expansion alone.

A favorable scenario combines application-relevant evidence with an active listing and dependable fulfillment. [redacted] Buyers should preserve qualified alternatives rather than assume that supplier familiarity or a newly announced relationship resolves every access condition across the Global market.

Sources & Evidence

1. Advanced Wound Care
   · Organized switching and competing supplier arrangements provide counterforces to unsupported differentiation. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/))
2. Mölnlycke and AROA Partner to Expand Access to Endoform in the US
   · The Endoform relationship adds co-promotion while AROA retains ownership and supply responsibilities. ([molnlycke.com](https://www.molnlycke.com/en-my/news/molnlycke-news/news---molnlycke-and-aroa-partner-to-expand-access-to-endoformtm-in-the-us/))

4.7.1. Near-Term Market Outlook (0-2 Years)

During 2026-2027, purchasing continuity and contract activation are more actionable than relying on a presumed successor arrangement. The published NHS NPWT framework expires March xx.xx 2027, and the Advanced Wound Care framework states August xx.xx 2027, with an extension option. ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■

The US post-acute Endoform co-promotion agreement effective October xx.xx 2026 creates a specific customer-interface decision. ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ The near-term milestone is an accepted and orderable relationship, not the agreement's announcement alone.

Sources & Evidence

1. Advanced Wound Care
   - The stated framework expires August xx.xx 2027 and includes an extension option, not a confirmed future extension. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/))
2. Negative Pressure Wound Therapy
   - The NPWT framework states an expiry of March xx.xx 2027. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
3. Mölnlycke and AROA Partner to Expand Access to Endoform in the US
   - The exclusive US post-acute co-promotion agreement is effective October xx.xx 2026; AROA continues manufacture, distribution, and supply. ([molnlycke.com](https://www.molnlycke.com/en-my/news/molnlycke-news/news---molnlycke-and-aroa-partner-to-expand-access-to-endoformtm-in-the-us/))

4.7.2. Medium-Term Market Outlook (3-5 Years)

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Sources & Evidence

1. Regulating medical devices in the UK
   · Great Britain guidance gives qualifying legacy-directive general devices an earlier-certificate-expiry or June xx.xx 2028 limit, subject to stated exceptions. Other routes and Northern Ireland differ. An announced consultation on indefinite CE recognition is not an enacted extension. ([gov.uk](https://www.gov.uk/guidance/regulating-medical-devices-in-the-uk))

4.7.3. Long-Term Market Outlook (5-10 Years)

During 2030-2032, the strategic opportunity is to reuse eligible compliance work without surrendering control of destination-specific commercial relationships. ■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■ Offering owners should organize reusable records around actual program acceptance rather than synchronize every territory commitment by a broad regional label.

Local accountability remains a separate dependency. Brazil's requirement for legally constituted domestic partners illustrates why a portfolio's international reach can depend on the entity controlling local records and obligations. ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■ ■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■ ■■ ■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■

Sources & Evidence

1. Medical devices
   · The Brazilian requirement establishes a local accountable-party dependency that shared audit documentation does not replace. ([gov.br](https://www.gov.br/anvisa/en/regulation-of-products/medical-devices))
2. Medical Device Single Audit Program (MDSAP)
   · MDSAP permits a single regulatory audit to address participating authorities' relevant requirements; participation and acceptance have defined scopes. ([fda.gov](https://www.fda.gov/medical-devices/cdrh-international-affairs/medical-device-single-audit-program-mdsap))

4.8. Go-to-Market Strategy

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Choose Wholesale & Distribution where the partner demonstrably controls the relevant purchasing interface and accepts its associated duties. ■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■

[redacted] Agreements should identify the product, territory, responsible legal party, records ownership, support, and lawful transition arrangements before broad exclusivity is granted.

[redacted] Otherwise, a less restrictive purchasing arrangement is preferable. Neither a financing label nor a purchasing concession should be presented as evidence of clinical benefit or payer eligibility.

Sources & Evidence

1. Procurement Services
   · A contracted distributor publishes onward to NSW Health; direct suppliers retain direct publication duties. Catalog participation does not itself constitute a tender award. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
2. National Pricing Matrices
   · National Pricing Matrices offer supplier-approved discounts against time-bound purchasing commitments. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/savings/npms))
3. Advanced Wound Care and Lymphoedema Products and Services Framework Agreement | SBS10142
   · The framework describes multidisciplinary formulary selection and Tissue Viability team involvement for products outside the ordering system. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
4. Medical devices
   · Anvisa states that foreign companies need legally constituted Brazilian partners responsible for imported and distributed products. ([gov.br](https://www.gov.br/anvisa/en/regulation-of-products/medical-devices))
5. Negative Pressure Wound Therapy
   · Consumables ordering is distinct from directly arranged equipment purchase, rental, and free-on-loan relationships. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

5. Market Insights

5.1. Consumer Insights & End-User Perspective

Clinical selection, provider budget ownership, and home-supply payment are separate purchasing decisions. ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■ ■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ Discharging providers should not treat product selection as confirmation that subsequent household replenishment is funded.

For Home Healthcare Providers and Self-Care Households, continuity of an accepted supply relationship is a decision-relevant need. ■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ Familiarity with the product cannot replace this commercial handoff, and these US examples do not establish a uniform global payment pathway.

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   - Medicare includes dressings applied within a billed professional service in that service's payment; eligible take-home dressing claims follow the applicable benefit requirements. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
2. V.A.C. Therapy patient support
   - Solventum's US V.A.C. patient information identifies prescribing and clinical-documentation requirements for insurance billing and describes possible equipment collection or personal payment responsibility when records are missing. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

5.2. Consumer Experience Benchmarking

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Standard dressings therefore remain a necessary purchasing comparator for that pathway. The result neither proves product interchangeability nor settles closed-incision prevention: buyers should match the comparator, surgical population, and purchasing objective before changing a formulary.

Sources & Evidence

1. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2)
   • SWHSI-xx.xx reported no clear healing-time benefit and found NPWT not cost-effective against usual care; participants predominantly had foot or leg wounds arising after vascular surgery. ([pubmed.ncbi.nlm.nih.gov](https://pubmed.ncbi.nlm.nih.gov/xx.xx/))
2. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement...
   • The 2020 open-label elective hip and knee replacement trial reported low dressing failure with both products, while Mepilex Border Post-Op performed better on handling and patient-experience measures than Aquacel Surgical. ([biblio.ugent.be](https://biblio.ugent.be/publication/xx.xx))

5.3. Opportunity Mapping

Institutional substitution is a more immediately actionable route for a supplier with an accepted offering than a broad claim of technological superiority. [redacted] These are route priorities, not geographic or supplier rankings.

[redacted] Suppliers should pursue buyer-approved applications rather than an all-surgery conversion campaign. Buyers should retain standard dressings as a credible comparator and reassess the proposition when relevant guidance or comparative evidence changes.

Post-discharge continuity offers a different commercial opportunity for providers and suppliers already able to support the selected platform. [redacted]

Keeping an existing accepted arrangement is preferable to changing channels when the replacement cannot assume those responsibilities.

[redacted] Own-label supply preserves market-facing brand control but adds rights, authorization, customer-acceptance, and continuity obligations; the branded route can be simpler where the customer already accepts it. The branded product's purchasing references do not automatically transfer to an OEM customer's version.

[redacted] Endoform has documented surgical applications, and the Mölnlycke Health Care-Aroa Biosurgery Limited US post-acute relationship provides an additional promotional interface while AROA retains supply responsibility. A receiving provider should confirm the eligible configuration, purchasing contact, and payer conditions rather than interpret promotion as funded postoperative adoption.

Topical Oxygen Therapy and Bioelectric Wound Therapy remain included but warrant verification before dedicated channel commitments. Palmetto GBA's topical-oxygen noncoverage determination has a defined local service scope and does not settle every oxygen-containing dressing. [redacted]

Sources & Evidence

1. Medical support
   · The documented support interface is a concrete service capability, not evidence of payer acceptance or postoperative outcomes. ([solventum.com](https://www.solventum.com/en-us/home/medical/support/))
2. Buy Products
   · Vomaris identifies an exclusive Arthrex JumpStart route for specified surgical specialties alongside a separate professional Procellera inquiry route. ([vomaris.com](https://vomaris.com/buy-products))
3. PICO negative pressure wound dressings for closed surgical incisions
   · The recommendation provides a bounded prevention proposition, not universal postoperative substitution. ([nice.org.uk](https://www.nice.org.uk/guidance/htg509/resources/pico-negative-pressure-wound-dressings-for-closed-surgical-incisions-pdf-xx.xx))
4. V.A.C. Therapy patient support
   · The US V.A.C. relationship includes replenishment and documentation-dependent billing; missing records can change equipment or payment arrangements. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

5. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2)
   · SWHSI-xx.xx found no clear healing-time benefit and found NPWT not cost-effective against usual care; the population predominantly had lower-limb wounds after vascular surgery. ([pubmed.ncbi.nlm.nih.gov](https://pubmed.ncbi.nlm.nih.gov/xx.xx/))
6. Topical Oxygen Therapy (L37873)
   · Palmetto GBA's topical-oxygen LCD specifies noncoverage within its stated service and jurisdictional scope; it does not settle every oxygen-containing dressing or payer. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?lcdid=xx.xx))
7. Advanced Wound Care and Lymphoedema Products and Services Framework Agreement | SBS10142
   · Its formulary-controlled ordering illustrates why a purchasing channel remains conditional on customer acceptance. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
8. Advanced Wound Care
   · Switching and mini-competitions create an institutional route for accepted alternatives, not automatic customer access. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/))
9. Ways of Working - OEM
   · The advertised finished-goods route establishes a business capability but not a customer's product-specific rights, authorization, or purchasing acceptance. ([admedsol.com](https://admedsol.com/capabilities/ways-of-working-oem/))
10. Foam Dressing - Wound Care Range - ActivHeal Foam
    · ActivHeal Foam Adhesive and Foam Non-Adhesive identify postoperative surgical applications and provide UK purchasing references. ([activheal.com](https://activheal.com/wound-care-dressing-range/foam-dressing/))
11. Endoform | AROA
    · AROA identifies specified surgical applications for Endoform, qualifies country availability and licensed indications, and does not guarantee payer coverage. ([aroa.com](https://aroa.com/product/endoform/))
12. Mölnlycke and AROA Partner to Expand Access to Endoform in the US
    · The agreement establishes a promotional interface, not transfer of fulfillment accountability or demonstrated postoperative acceptance. ([molnlycke.com](https://www.molnlycke.com/en-my/news/molnlycke-news/news---molnlycke-and-aroa-partner-to-expand-access-to-endoformtm-in-the-us/))
13. Negative Pressure Dressings to Prevent Surgical Site Infection After Emergency Laparotomy: The SUNRRISE Randomized Clinical Trial
    · The emergency-laparotomy comparison challenges automatic transfer of a prevention proposition across closed-incision applications. ([jamanetwork.com](https://jamanetwork.com/journals/jama/fullarticle/xx.xx))

5.4. Distribution Channel Analysis

[redacted] Buyers should identify who owns the equipment contract, replenishment obligation, and support commitment before changing the supplying party. A replacement consumables channel should not be assumed to transfer the equipment relationship.

Institutional channel partners can contribute purchasing-system access and information maintenance. HealthShare NSW assigns onward catalog publication to the contracted distributor when it supplies the customer; direct vendors retain direct publication

responsibility. ■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■ ■ ■■■■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■

Patient-facing digital ordering can also operate within a professionally controlled supply relationship. Solventum offers app-based ordering and direct support for V.A.■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■

Sources & Evidence

1. Negative Pressure Wound Therapy
   - The NHS NPWT framework runs through March xx.xx 2027, separates catalog consumables from direct equipment arrangements, and includes purchase, rental, and free-on-loan options. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy))
2. V.A.C. Therapy patient support
   - Solventum offers patient-facing app and telephone routes for V.A.C. supply ordering and support within its professionally directed supply relationship. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
3. Procurement Services
   - HealthShare NSW assigns onward catalog publication to contracted distributors where they supply the customer; direct vendors publish directly. Invalid effective-date records can block item processing. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

5.5. Pricing Trend Analysis

Institutional pricing can exchange purchasing flexibility for contractual certainty. NHS Supply Chain lists Advanced Wound Care among frameworks with National Pricing Matrices, under which supplier-approved discounts depend on a purchasing commitment over an agreed period. ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■

Upstream cost exposure does not establish automatic customer repricing. ■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■ Fixed commitments can protect customer budgets while leaving suppliers exposed when recovery mechanisms are limited.

Sources & Evidence

1. Solventum Corporation - 2025 Form 10-K
   - Solventum attributed 2025 MedSurg cost pressure to tariffs, logistics, and 3M supply-agreement markups; it separately identifies inflation and input availability as supply risks. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

2. National Pricing Matrices
   - NHS Supply Chain lists Advanced Wound Care among frameworks with National Pricing Matrices. Supplier-approved discounts require time-bound purchasing commitments, and agreed tiers may be amended when commitments are not met. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/savings/npms/))

5.6. Regulatory Compliance & Standards Framework

[redacted] The April 2026 MDCG classification guidance distinguishes wound-dressing classes and applicable special rules; it is interpretive guidance, not legally binding legislation. Suppliers entering European purchasing processes should establish the applicable classification and conformity route for their actual claims rather than assume that a shared dressing category creates equivalent access.

[redacted] Australia's ARTG separately identifies AQUACEL Ag Surgical Cover Dressing with Convatec Australia Pty Ltd as sponsor and Convatec Limited as manufacturer. Neither quality-system alignment nor that registry relationship alone establishes reimbursement, fulfillment, or acceptance by an institutional purchaser.

Consumer communication and commercial rights also require separate review. The TGA's June xx.xx 2023 approval for specified Mepilex Border Post Op advertising representations requires accompanying professional-supervision statements. [redacted]

Sources & Evidence

1. Convatec Australia Pty Ltd - AQUACEL Ag Surgical Cover Dressing - Dressing, hydrophilic gel-forming (216814)
   - ARTG entry xx.xx identifies AQUACEL Ag Surgical Cover Dressing, Convatec Australia Pty Ltd as sponsor, and Convatec Limited as manufacturer. ([tga.gov.au](https://www.tga.gov.au/resources/artg/xx.xx))
2. Molnlycke Health Care Pty Ltd - Adhesive bandage
   - The TGA's June xx.xx 2023 approval permits specified Mepilex Border Post Op consumer advertising representations with accompanying healthcare-professional-supervision statements. ([tga.gov.au](https://www.tga.gov.au/resources/advertising-permissions/molnlycke-health-care-pty-ltd-adhesive-bandage))
3. MDCG 2021-24 Rev.1 - Guidance on classification of medical devices
   - The April 2026 MDCG classification guidance distinguishes wound-dressing classes by intended purpose and applicable special rules. The guidance explicitly states that it is not legally binding. ([health.ec.europa.eu](https://health.ec.europa.eu/system/files/2021-xx.xx/mdcg_2021-24_en_0.pdf))
4. Quality Management System Regulation (QMSR)
   - FDA's QMSR became effective on February xx.xx 2026, incorporates ISO xx.xx:2016, and applies to finished-device manufacturers within its stated scope and exemptions. ([fda.gov](https://www.fda.gov/medical-devices/postmarket-requirements-devices/quality-management-system-regulation-qmsr))

5. Solventum Corporation - 2025 Form 10-K
   · Solventum discloses patent protections and third-party IP licensing, without establishing an offering-specific postoperative patent barrier. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5.7. ESG & Sustainability Analysis

Environmental and social performance can affect institutional eligibility before product differentiation is considered. The NHS Advanced Wound Care framework requires supplier records covering carbon reduction, Evergreen assessment, modern slavery, social value, and its net zero roadmap. [redacted]

Product-level sustainability claims require a different comparison. [redacted] Clinical requirements can limit whether a service-life proposition produces the claimed environmental benefit.

Sources & Evidence

1. Advanced Wound Care
   · The NHS Advanced Wound Care framework includes mandatory supplier requirements covering carbon reduction, Evergreen assessment, modern slavery, social value, and the net zero supplier roadmap. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care))
2. Sustainable portfolios
   · Mölnlycke positions longer Mepilex Border Post-Op service life as a potential waste-reduction lever. Its published LCA comparison policy uses its own portfolio rather than competitors as the comparison boundary. ([molnlycke.com](https://www.molnlycke.com/en-us/sustainability/sustainable-healthcare-solutions/))

5.8. Disruption & Risk Scenarios

Offering withdrawal can invalidate a familiar purchasing route without removing the supplier's entire portfolio. [redacted] Buyers should establish an unaffected, lawfully available, accepted alternative rather than substitute on a shared material label.

[redacted]

[redacted] Providers and suppliers should assign records ownership, escalation, and payer-resolution duties before transfer. The monitoring signal is an unresolved eligibility or documentation exception, not proof of product inadequacy; requirements must remain matched to the actual benefit.

[redacted] Offering owners should negotiate continuity, customer-record access, and transition responsibilities before granting broad rights. Direct coverage retains greater interface control but adds commercial obligations; appointing another intermediary is unsuitable until its actual rights and customer acceptance are established.

Trade-cost shocks expose the party unable to adjust an existing commitment. Solventum disclosed 2025 MedSurg pressure from tariffs and logistics alongside company-specific supply arrangements. [redacted]

Sources & Evidence

1. Negative Pressure Wound Therapy Pumps (L33821)
   · The NPWT LCD requires applicable written orders, delivery evidence, and affirmative refill requests; unmet requirements can lead to denial.
   ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?LCDid=xx.xx))
2. Solventum Corporation - 2025 Form 10-K
   · Solventum attributes 2025 MedSurg cost pressure partly to tariffs, logistics, and 3M supply-agreement markups; this is not a postoperative-dressing-wide result.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
3. National Pricing Matrices
   · Suppliers may amend agreed tiers when purchasing commitments are unmet; this is not automatic tariff pass-through. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/savings/npms))
4. Covalon Technologies Ltd. - MD&A Q1 F-2026
   · Covalon's fiscal 2026 first-quarter disclosure reports disruption associated with an advanced-wound-care partner's ownership transition, without postoperative-specific attribution.
   ([s202.q4cdn.com](https://s202.q4cdn.com/xx.xx/files/doc_financials/2026/q1/Q1-FY2026-MD-A.pdf))
5. Wound and Burn Dressing Recall: Integra LifeSciences Removes Certain MediHoney and CVS Products
   · FDA's March xx.xx 2026 update classifies the identified MediHoney and CVS action as a Class II recall; the notice is product-specific.
   ([fda.gov](https://www.fda.gov/medical-devices/medical-device-recalls-and-early-alerts/wound-and-burn-dressing-recall-integra-lifesciences-removes-certain-medihoney-and-cvs-wound-and-burn))

5.9. Return on Investment & Cost-Benefit Analysis

[redacted] Standard dressings remain a necessary alternative. The commitment should be narrowed or deferred where the proposed application lacks the benefit assumed in the business case.

Budget ownership can also separate clinical value from financial realization. Medicare includes professional-service dressings in the service payment while eligible take-home supplies follow their applicable benefit. [redacted]

For an offering owner or distributor, direct coverage and partner commercialization exchange selling responsibility for interface control. [redacted] If these prerequisites are unsettled, retaining an existing qualified route or limiting the commercial commitment is preferable to assuming that broader reach will produce a satisfactory return.

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   · Medicare includes dressings furnished within a billed professional service in that service's payment; qualifying take-home supplies follow a separate benefit determination. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
2. PICO negative pressure wound dressings for closed surgical incisions
   · NICE's overall-cost conclusion is modeled and compares PICO with standard dressings within its stated scope. ([nice.org.uk](https://www.nice.org.uk/guidance/htg509/resources/pico-negative-pressure-wound-dressings-for-closed-surgical-incisions-pdf-xx.xx))
3. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2)
   · The unfavorable economic comparison is pathway-specific and cannot establish a result for every postoperative application. ([pubmed.ncbi.nlm.nih.gov](https://pubmed.ncbi.nlm.nih.gov/xx.xx/))

4. National Pricing Matrices
   - The commitment structure creates a qualitative trade-off between purchasing concessions and flexibility. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/savings/npms))
5. Advanced Wound Care
   - The framework's resilience measures include UK warehouse stockholding and forward planning. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/))
6. Covalon Technologies Ltd. - MD&A Q1 F-2026
   - Covalon describes both direct selling and independent-distributor commercialization, providing distinct customer-interface alternatives. ([s202.q4cdn.com](https://s202.q4cdn.com/xx.xx/files/doc_financials/2026/q1/Q1-FY2026-MD-A.pdf))
7. Negative Pressure Dressings to Prevent Surgical Site Infection After Emergency Laparotomy: The SUNRRISE Randomized Clinical Trial
   - The trial does not support assuming an infection-prevention benefit from routine incisional NPWT in the studied setting. ([jamanetwork.com](https://jamanetwork.com/journals/jama/fullarticle/xx.xx))

6. Cumulative Impact of Artificial Intelligence 2026

AI's evidenced commercial influence reaches the information surrounding dressing decisions, rather than demonstrating an AI feature of the dressings themselves. ■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■ ■■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ This establishes reported workflow adoption, not postoperative-specific effectiveness or proof that AI improves the choice of dressing.

■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■ If postoperative episodes and offering identities are captured consistently, such information could support formulary review and cross-setting coordination. This remains a conditional commercial use: observational records do not establish comparative product causation, and an advertised integration does not guarantee compatibility with a particular customer's environment.

Implementation also changes the buying constituency. NHS guidance recommends DTAC assessment across clinical safety, data protection, technical assurance, interoperability, usability, and accessibility. ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■ ■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. AI-powered wound care receives high commendation
   · West London NHS Trust reports implementing Healthy.io's Minuteful for Wound in July 2022 across general wound services, with remote image review and management reporting. ([westlondon.nhs.uk](https://www.westlondon.nhs.uk/news/latest-news/ai-powered-wound-care-receives-high-commendation))
2. Transforming Wound Care Data into Intelligence
   · eKare describes inSight as combining computer vision and machine learning with structured wound records, including dressing-use information. These are advertised capabilities, not independent evidence of postoperative purchasing outcomes. ([ekare.ai](https://ekare.ai/uk-wound-management-digital-system/))
3. eKare Launches Enhanced Integration with EMIS
   · eKare reports integration between inSight and EMIS for patient-information exchange and wound-record transfer, subject to information-governance and clinical-safety requirements. ([ekare.ai](https://ekare.ai/ekare-launches-enhanced-integration-with-emis/))
4. Digital healthcare technologies in the NHS
   · NHS guidance recommends DTAC when introducing digital technologies, covering clinical safety, data protection, technical assurance, interoperability, usability, and accessibility. ([innovation.nhs.uk](https://innovation.nhs.uk/innovation-guides/regulation/digital-product-or-service/))

7. Post-Operative Wound Dressings Market, by Dressing Type

Dressing Type changes the purchasing comparison, not simply the material description. NHS Supply Chain separates pads, contact layers, foams, hydrogels, hydrocolloids, films, and other constructions into purchasing groups and supports switching within specified categories. ■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■

Collagen Dressings and Acellular Extracellular Matrix Dressings require particular care when matching commercial categories to regulatory identities. ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ Suppliers should identify the actual offering and applicable purchasing route before assuming that a collagen-related code establishes eligibility for a matrix tender, or vice versa.

Specialty material identities also require presentation-specific interpretation. ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■■■■■ ■■ ■ ■■■■■■ ■■■■■■■■ ■■■■■■ ■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■ These records establish particular regulatory identities, not comparative purchasing superiority or continuing availability in every territory.

Absorbent Acrylic Dressings, Activated Charcoal Dressings, and Capillary Action Dressings have named categories in the October 2026 Drug Tariff, while NHS specialty specifications also recognize Biocellulose Dressings. ■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ Specialty differentiation can justify retaining an alternative; a broad wound-care listing alone cannot establish that justification.

Figure 8. Global Post-Operative Wound Dressings Market Size, by Dressing Type, 2025 (%)

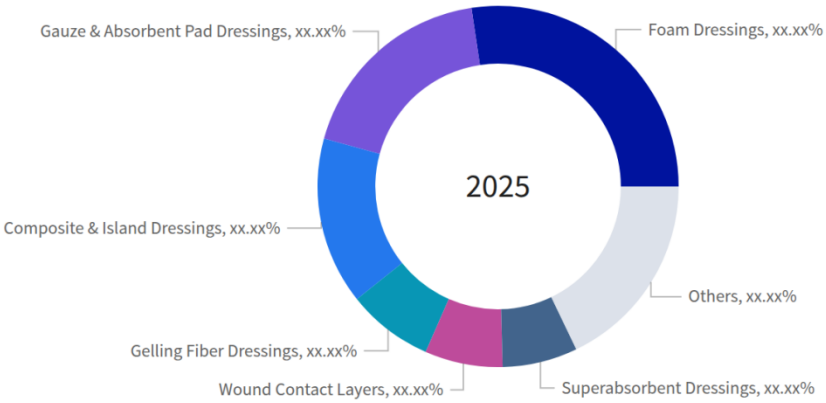


Figure 9. Global Post-Operative Wound Dressings Market, by Dressing Type, 2032 (USD Million)

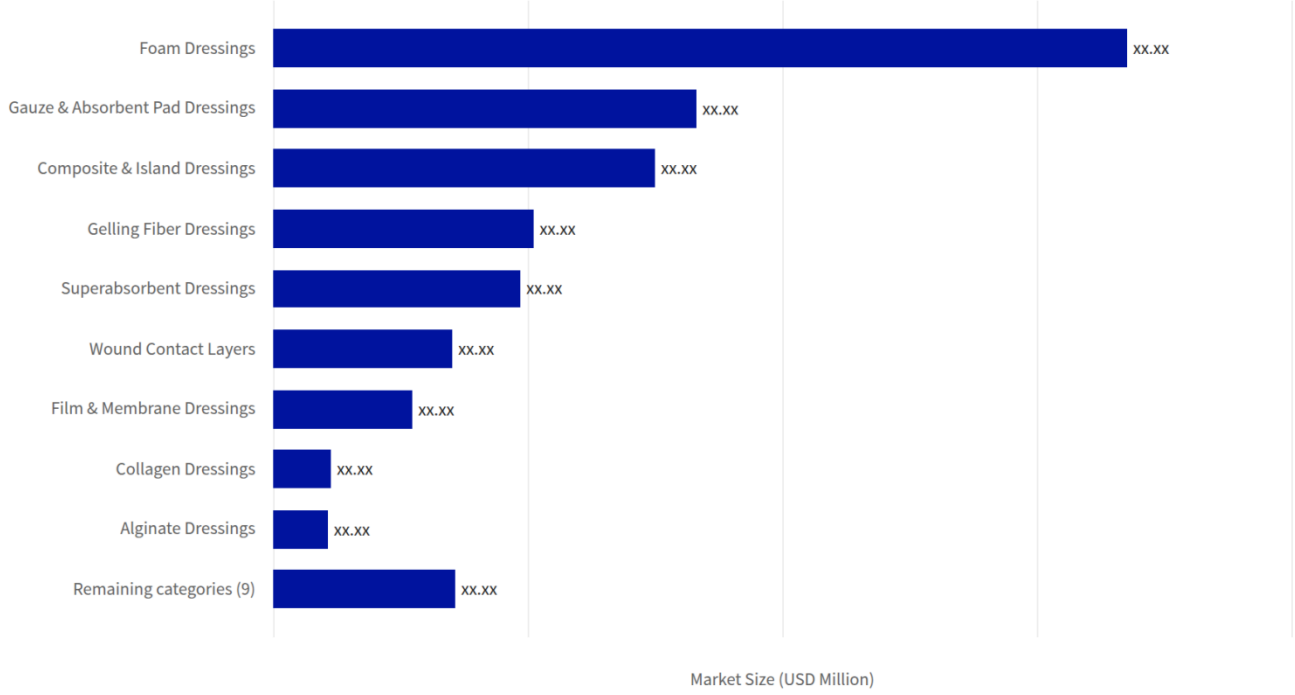


Table 4. Global Post-Operative Wound Dressings Market, by Dressing Type growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 5. Global Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   - Composite and multicomponent dressings cannot be unbundled into separate component claims. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.

2. Advanced Wound Care
   - The framework separates dressing constructions and supports switching and mini-competitions in specified categories.
   ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care))
3. Advanced Wound Care Specification
   - The specification recognizes collagen, temporary matrix, acrylic, capillary-action, and biocellulose dressings; temporary matrices have distinct purchasing eligibility conditions.
   ([sccl.nhs.uk](https://www.sccl.nhs.uk/wp-content/uploads/2026/xx.xx/Advanced-Wound-Care-Specification.pdf))
   - Taxonomy evidence: The specialty procurement specification explicitly recognizes temporary matrix dressings separately from collagen dressings and sets a nonimplant purchasing boundary for that named group. This is an English procurement-category anchor, not a universal regulatory definition or automatic eligibility rule for acellular products.
   ([sccl.nhs.uk](https://www.sccl.nhs.uk/wp-content/uploads/2026/xx.xx/Advanced-Wound-Care-Specification.pdf))
   - Taxonomy evidence: Procurement separates base dressing families and treats antimicrobial status as a cross-cutting property. These are English purchasing definitions, not Global demand estimates.
   ([sccl.nhs.uk](https://www.sccl.nhs.uk/wp-content/uploads/2026/xx.xx/Advanced-Wound-Care-Specification.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.

4. NeoMatriX Wound Matrix (K210024) - FDA clearance letter and 510(k) summary
   - NeoMatriX is described using collagen-dressing terminology and acellular extracellular-matrix characteristics, with surgical-wound indications. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf21/K210024.pdf))
   - Taxonomy evidence: The shared terminology supports an explicit product-identity precedence rule rather than treating the commercial construction partition as a reproduction of regulatory codes. This is a classification inference, not a new regulatory distinction. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf21/K210024.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
5. HYALOMATRIX (K261311) - FDA clearance letter and 510(k) summary
   - The September xx.xx 2026 HYALOMATRIX clearance addresses an updated presentation against an earlier predicate and includes surgical-wound indications. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf26/K261311.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
6. KA01 Chitosan Wound Dressing (K143124) - 510(k) summary
   - KA01 Chitosan Wound Dressing has prescription surgical-wound indications. The record establishes a named product identity, not continuing global availability. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf14/K143124.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
7. Drug Tariff Part IX - October 2026
   - The October 2026 tariff names absorbent acrylic, activated-charcoal, and capillary-action dressing categories; these listings do not establish every postoperative application. ([nhsbsa.nhs.uk](https://www.nhsbsa.nhs.uk/sites/default/files/2026-xx.xx/Drug%20Tariff%20Part%20IX%20October%xx.xx.pdf))
8. Surgical Dressings - Policy Article A54563
   - Taxonomy evidence: Multi-component dressings are classified by a predominant component; composite products cannot be unbundled into constituent dressing claims. US coding rules are terminology anchors, not the Global market boundary. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx&bc=xx.xx&contractorName=all&contractorNumber=all&sortBy=updated&updatePeriod=xx.xx&ver=xx.xx))
9. GPSDP October 26-27, 2022 Presentation - Wound Dressings with Animal-Derived Materials
   - Taxonomy evidence: The regulator's October xx.xx-xx.xx 2022 presentation addresses animal-derived wound dressings as a category. This record alone does not settle product-level exclusions for skin substitutes or reconstructive implants. ([fda.gov](https://www.fda.gov/media/xx.xx/download))

10. Size and distribution of the global volume of surgery in 2012.

· Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

11. Solventum Corporation - 2025 Form 10-K

· Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

12. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

13. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

14. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

15. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

16. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

17. NHS Supply Chain - Negative Pressure Wound Therapy

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration.
([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

· Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement.
([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.

19. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
20. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
21. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
22. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
23. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.

24. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
25. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
26. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
27. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.

7.1. Foam Dressings

Table 6. Global Post-Operative Wound Dressings Market Size, by Foam Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 7. Global Post-Operative Wound Dressings Market Size, by Foam Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 8. Global Post-Operative Wound Dressings Market Size, by Foam Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K190268 - Hydrofera Blue READY-Border: 510(k) Summary
   · Taxonomy evidence: The same postoperative dressing is described as an absorptive polyurethane foam with an outer film and silicone adhesive border. This independently corroborates that a foam construction can retain a distinct multi-agent antimicrobial allocation.
   ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf19/K190268.pdf))
2. Surgical Dressings - Policy Article A54563
   · Taxonomy evidence: Recognizes foam wound covers and foam fillers.
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
20. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
21. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.

7.2. Gauze & Absorbent Pad Dressings

Table 9. Global Post-Operative Wound Dressings Market Size, by Gauze & Absorbent Pad Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 10. Global Post-Operative Wound Dressings Market Size, by Gauze & Absorbent Pad Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 11. Global Post-Operative Wound Dressings Market Size, by Gauze & Absorbent Pad Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Policy Article A54563
   - Taxonomy evidence: Recognizes woven/nonwoven gauze and specialty absorptive pads.
2. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. **Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.

7.3. Composite & Island Dressings

Table 12. Global Post-Operative Wound Dressings Market Size, by Composite & Island Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 13. Global Post-Operative Wound Dressings Market Size, by Composite & Island Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 14. Global Post-Operative Wound Dressings Market Size, by Composite & Island Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K180533 - Procellera Composite Antibacterial Wound Dressing
   · Taxonomy evidence: The finished product has a contact layer, an absorbent layer and an adhesive outer layer. It is a regulatory example of an integrated cover architecture that can be allocated independently from its therapy platform. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf18/K180533.pdf))
2. NHS Supply Chain - Advanced Wound Care Specification
   · Taxonomy evidence: Separate nonwoven-island and film-island purchasing groups support aggregating conventional integrated pad-and-backing covers.
3. Surgical Dressings - Policy Article A54563
   · Taxonomy evidence: Defines conventional composite covers separately from foam, gelling-fiber, hydrocolloid and hydrogel absorptive layers.
4. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

5. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

6. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

7. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

8. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

9. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

10. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

11. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

13. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
14. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
15. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

16. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
17. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
18. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
19. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
20. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
21. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
22. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.

7.4. Gelling Fiber Dressings

Table 15. Global Post-Operative Wound Dressings Market Size, by Gelling Fiber Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 16. Global Post-Operative Wound Dressings Market Size, by Gelling Fiber Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 17. Global Post-Operative Wound Dressings Market Size, by Gelling Fiber Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. NHS Supply Chain - Advanced Wound Care Specification
   - Taxonomy evidence: Alginates and gelling fibers are explicitly distinguished within their purchasing group.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
2. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
19. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.

7.5. Wound Contact Layers

Table 18. Global Post-Operative Wound Dressings Market Size, by Wound Contact Layers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 19. Global Post-Operative Wound Dressings Market Size, by Wound Contact Layers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 20. Global Post-Operative Wound Dressings Market Size, by Wound Contact Layers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Policy Article A54563
   - Taxonomy evidence: Contact layers are porous, nonabsorptive interfaces, distinct from absorptive covers.
2. FDA K152970 - Dynarex Xeroform Petrolatum Dressing
   - Taxonomy evidence: The product is positioned as a primary contact layer, supporting role-based classification of qualifying low-adherence impregnated fabric.
3. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

7.6. Superabsorbent Dressings

Table 21. Global Post-Operative Wound Dressings Market Size, by Superabsorbent Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 22. Global Post-Operative Wound Dressings Market Size, by Superabsorbent Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 23. Global Post-Operative Wound Dressings Market Size, by Superabsorbent Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. NHS Supply Chain - Advanced Wound Care Specification
   - Taxonomy evidence: Superabsorbent dressings form a dedicated lot, distinct from foams and conventional pads.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
2. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
6. Smith+Nephew Second Quarter and First Half 2026 Results
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
7. Convatec - Interim Results for the Six Months Ended 30 June 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
19. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.

7.7. Film & Membrane Dressings

Table 24. Global Post-Operative Wound Dressings Market Size, by Film & Membrane Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 25. Global Post-Operative Wound Dressings Market Size, by Film & Membrane Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 26. Global Post-Operative Wound Dressings Market Size, by Film & Membrane Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Local Coverage Determination L33831

   · Taxonomy evidence: The US policy recognizes transparent-film dressings as a named dressing family; reimbursement eligibility is not a Global sales measure. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?lcdid=xx.xx))

2. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

3. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

7.8. Alginate Dressings

Table 27. Global Post-Operative Wound Dressings Market Size, by Alginate Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 28. Global Post-Operative Wound Dressings Market Size, by Alginate Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 29. Global Post-Operative Wound Dressings Market Size, by Alginate Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Policy Article A54563
   - Taxonomy evidence: Recognizes alginate/gelling-fiber covers and fillers.

2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
6. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
7. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.

7.9. Hydrocolloid Dressings

Table 30. Global Post-Operative Wound Dressings Market Size, by Hydrocolloid Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 31. Global Post-Operative Wound Dressings Market Size, by Hydrocolloid Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 32. Global Post-Operative Wound Dressings Market Size, by Hydrocolloid Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Local Coverage Determination L33831
   - Taxonomy evidence: Separately recognizes hydrocolloid dressings and wound fillers.

2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
6. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
7. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

7.10. Collagen Dressings

Table 33. Global Post-Operative Wound Dressings Market Size, by Collagen Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 34. Global Post-Operative Wound Dressings Market Size, by Collagen Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 35. Global Post-Operative Wound Dressings Market Size, by Collagen Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K210024 - NeoMatriX Wound Matrix: Clearance and 510(k) Summary

   · Taxonomy evidence: The same record calls the device a collagen wound dressing while expressly describing acellular extracellular-matrix characteristics. Therefore, regulatory collagen terminology alone cannot separate the retained commercial Collagen Dressings and Acellular Extracellular Matrix Dressings peers. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf21/K210024.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.

2. Surgical Dressings - Local Coverage Determination L33831

   · Taxonomy evidence: Recognizes collagen-based dressings and wound fillers as a distinct commercial family.

3. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

4. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.
10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.

20. NHS Supply Chain Advanced Wound Care Specification
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.

7.11. Acellular Extracellular Matrix Dressings

Table 36. Global Post-Operative Wound Dressings Market Size, by Acellular Extracellular Matrix Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 37. Global Post-Operative Wound Dressings Market Size, by Acellular Extracellular Matrix Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 38. Global Post-Operative Wound Dressings Market Size, by Acellular Extracellular Matrix Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K210024 - NeoMatriX Wound Matrix: Clearance and 510(k) Summary

   · Taxonomy evidence: The October xx.xx 2021 record identifies NeoMatriX as an acellular extracellular-matrix wound dressing and includes surgical wounds among its indications. It establishes a qualifying category example without resolving all dressing-versus-tissue-replacement boundaries. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf21/K210024.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.

2. AccessGUDID - OASIS, Device Identifier 00827002466234
   - Taxonomy evidence: The OASIS record identifies an animal-derived wound matrix dressing, links it to K061711 and reports In Commercial Distribution. Its public version date is July xx.xx 2025. This corroborates a registered commercial matrix-dressing identity, not realized postoperative sales or blanket eligibility of matrix products. ([accessgudid.nlm.nih.gov](https://accessgudid.nlm.nih.gov/devices/xx.xx))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
3. NHS Supply Chain - Advanced Wound Care Specification
   - Taxonomy evidence: Recognition of temporary matrix dressings supports a dressing-versus-implant distinction at the commercial category level, but does not identify every qualifying acellular matrix or settle dual-described skin-substitute products. ([sccl.nhs.uk](https://www.sccl.nhs.uk/wp-content/uploads/2026/xx.xx/Advanced-Wound-Care-Specification.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
4. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
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7. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
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10. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

11. NHS Supply Chain - Negative Pressure Wound Therapy

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

· Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

14. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

20. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
21. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.

7.12. Hydrogel Dressings

Table 39. Global Post-Operative Wound Dressings Market Size, by Hydrogel Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 40. Global Post-Operative Wound Dressings Market Size, by Hydrogel Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 41. Global Post-Operative Wound Dressings Market Size, by Hydrogel Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Local Coverage Determination L33831
   · Taxonomy evidence: Separately recognizes hydrogel dressings and wound fillers.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

7.13. Hyaluronic Acid Dressings

Table 42. Global Post-Operative Wound Dressings Market Size, by Hyaluronic Acid Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 43. Global Post-Operative Wound Dressings Market Size, by Hyaluronic Acid Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 44. Global Post-Operative Wound Dressings Market Size, by Hyaluronic Acid Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K261311 - HYALOMATRIX: Clearance and 510(k) Summary

   · Taxonomy evidence: The September xx.xx 2026 clearance and enclosed summary identify HYALOMATRIX as a single-use hyaluronic-acid-derivative wound dressing with surgical-wound indications, including donor sites and dehiscence. This directly supports category identity, not Global sales or 2025 revenue. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf26/K261311.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.

2. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

3. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
19. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
20. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.

7.14. Absorbent Acrylic Dressings

Table 45. Global Post-Operative Wound Dressings Market Size, by Absorbent Acrylic Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 46. Global Post-Operative Wound Dressings Market Size, by Absorbent Acrylic Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 47. Global Post-Operative Wound Dressings Market Size, by Absorbent Acrylic Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Drug Tariff Part IX - October 2026
   - Taxonomy evidence: The October 2026 tariff contains a named transparent absorbent acrylic-dressing category. Listing establishes purchasing recognition, not postoperative demand. ([nhsbsa.nhs.uk](https://www.nhsbsa.nhs.uk/sites/default/files/2026-xx.xx/Drug%20Tariff%20Part%20IX%20October%xx.xx.pdf))
2. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.

7.15. Chitosan Dressings

Table 48. Global Post-Operative Wound Dressings Market Size, by Chitosan Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 49. Global Post-Operative Wound Dressings Market Size, by Chitosan Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 50. Global Post-Operative Wound Dressings Market Size, by Chitosan Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K143124 - KA01 Chitosan Wound Dressing

   · Taxonomy evidence: The regulatory summary identifies a chitosan wound-dressing family with surgical-wound and donor-site applications. It establishes category and indication history, not current sales or a commercial antimicrobial claim. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf14/K143124.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.

2. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

3. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.
9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.

19. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.

7.16. Biocellulose Dressings

Table 51. Global Post-Operative Wound Dressings Market Size, by Biocellulose Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 52. Global Post-Operative Wound Dressings Market Size, by Biocellulose Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 53. Global Post-Operative Wound Dressings Market Size, by Biocellulose Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. NHS Supply Chain - Advanced Wound Care Specification
   - Taxonomy evidence: Hydrobalance biocellulose dressings are explicitly named.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
2. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.

7.17. Activated Charcoal Dressings

Table 54. Global Post-Operative Wound Dressings Market Size, by Activated Charcoal Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 55. Global Post-Operative Wound Dressings Market Size, by Activated Charcoal Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 56. Global Post-Operative Wound Dressings Market Size, by Activated Charcoal Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Drug Tariff Part IX - October 2026
   - Taxonomy evidence: Lists activated-charcoal absorbent dressings.

2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
6. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
7. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

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   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.

7.18. Capillary Action Dressings

Table 57. Global Post-Operative Wound Dressings Market Size, by Capillary Action Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 58. Global Post-Operative Wound Dressings Market Size, by Capillary Action Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 59. Global Post-Operative Wound Dressings Market Size, by Capillary Action Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Drug Tariff Part IX - October 2026
   - Taxonomy evidence: Lists a capillary-action absorbent-wound-dressing category.

2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
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   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

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17. Anvisa - Medical devices
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18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.

8. Post-Operative Wound Dressings Market, by Therapy Platform

[redacted] Institutional buyers should compare equipment access and replenishment together before selecting a financing route. An alternative consumables supplier is not automatically a replacement for the equipment relationship.

Topical Oxygen Therapy includes finished dressings whose published applications must be distinguished from oxygen-service coverage. OxyBand's manufacturer information identifies clean closed surgical incisions within its prescription indications, while describing a different scope for its over-the-counter products. [redacted]

Bioelectric Wound Therapy introduces offering-specific channel rights. [redacted] The established specialty route offers a defined commercial contact, but the public pages do not establish every contractual obligation, local authorization, or purchasing approval.

Figure 10. Global Post-Operative Wound Dressings Market Size, by Therapy Platform, 2025 (%)

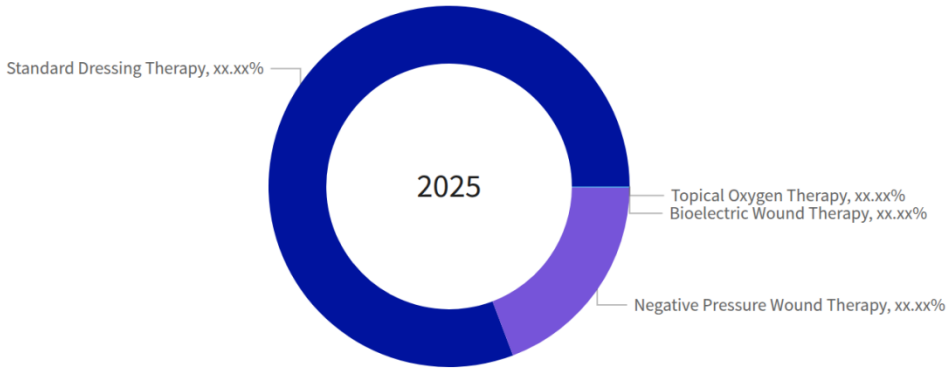


Figure 11. Global Post-Operative Wound Dressings Market, by Therapy Platform, 2032 (USD Million)

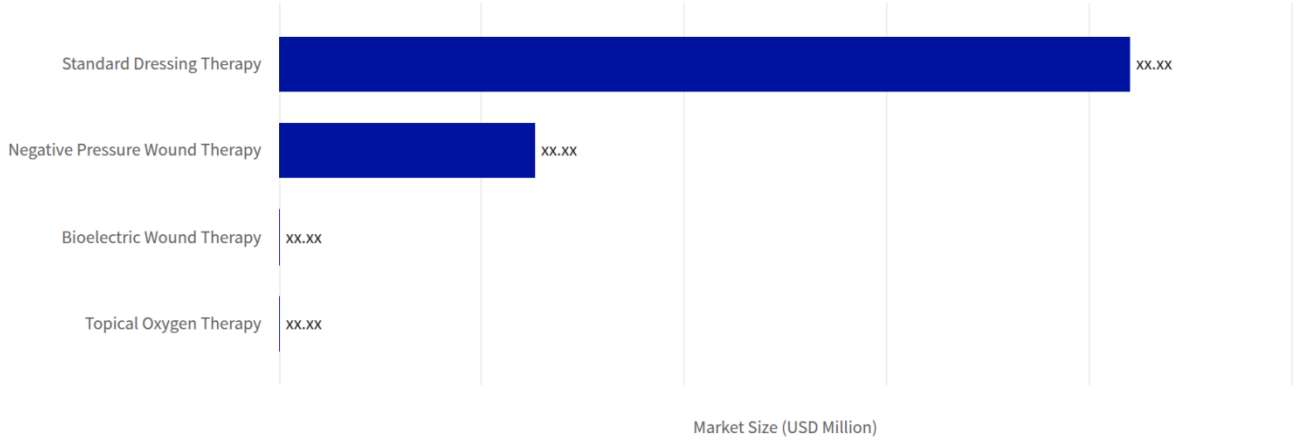


Table 60. Global Post-Operative Wound Dressings Market, by Therapy Platform growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 61. Global Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. JumpStart Antimicrobial Wound Dressing
   - Arthrex independently lists JumpStart for surgical-incision management. ([arthrex.com](https://www.arthrex.com/orthobiologics/jumpstart))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
2. Negative Pressure Wound Therapy
   - The NPWT framework separates catalog consumables from direct equipment arrangements and offers purchase, rental, and free-on-loan options. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy))
3. Buy Products
   - Vomaris directs specified surgical specialties exclusively to Arthrex for JumpStart and maintains a separate professional Procellera inquiry route. ([vomaris.com](https://vomaris.com/buy-products))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.

4. Topical Oxygen Therapy (L37873)
   - Palmetto's LCD establishes topical-oxygen service noncoverage within its stated scope and explains local-contractor coverage authority. It does not settle every oxygen-containing dressing. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?lcdid=xx.xx))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
5. OxyBand Technologies - FDA Clearance
   - OxyBand distinguishes prescription indications including clean closed surgical incisions from its over-the-counter application scope. ([oxyband.com](https://oxyband.com/Research/OxyBand-FDA.php))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
6. NHS Supply Chain - Advanced Wound Care Specification
   - Taxonomy evidence: Specialty purchasing includes topical oxygen and electrostimulation wound therapy.

7. NHS Supply Chain - Negative Pressure Wound Therapy

   · Taxonomy evidence: Procurement separates therapy equipment and pump rentals from NPWT consumables, supporting dressing-only accounting. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.

8. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

9. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

10. Smith+Nephew Fourth Quarter and Full Year 2020 Results

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

11. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

12. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

13. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

14. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

15. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

16. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.

17. Vomaris Innovations - Corporate Overview, 2023

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.

18. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.

8.1. Standard Dressing Therapy

Table 62. Global Post-Operative Wound Dressings Market Size, by Standard Dressing Therapy, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 63. Global Post-Operative Wound Dressings Market Size, by Standard Dressing Therapy, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 64. Global Post-Operative Wound Dressings Market Size, by Standard Dressing Therapy, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA Executive Summary - Classification of Wound Dressings Containing Drugs, September 20-21, 2016
   · Taxonomy evidence: Describes dressing functions including wound protection, exudate management and maintenance of a moist environment, supporting a standalone dressing-therapy class.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
6. Smith+Nephew Second Quarter and First Half 2026 Results
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
7. Convatec - Interim Results for the Six Months Ended 30 June 2026
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.

8.2. Negative Pressure Wound Therapy

Table 65. Global Post-Operative Wound Dressings Market Size, by Negative Pressure Wound Therapy, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 66. Global Post-Operative Wound Dressings Market Size, by Negative Pressure Wound Therapy, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 67. Global Post-Operative Wound Dressings Market Size, by Negative Pressure Wound Therapy, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. NHS Supply Chain - Negative Pressure Wound Therapy

   · Taxonomy evidence: The framework covers vacuum dressings for surgical wounds and includes a distinct consumables lot; it does not establish the dressing value inside every integrated system.

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration.
   ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement.
   ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.

2. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

3. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

10. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
12. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

13. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
14. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
15. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
16. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

8.3. Bioelectric Wound Therapy

Table 68. Global Post-Operative Wound Dressings Market Size, by Bioelectric Wound Therapy, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 69. Global Post-Operative Wound Dressings Market Size, by Bioelectric Wound Therapy, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 70. Global Post-Operative Wound Dressings Market Size, by Bioelectric Wound Therapy, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K180533 - Procellera Composite Antibacterial Wound Dressing

   · Taxonomy evidence: The December xx.xx 2018 clearance identifies a finished antibacterial dressing with an integral electrical architecture and professional-use indications including surgical incisions and graft sites. This establishes postoperative regulatory identity without asserting clinical superiority or worldwide availability. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf18/K180533.pdf))

2. AccessGUDID - Procellera Composite, Device Identifier 00894318002456

· Taxonomy evidence: The registry assigns the explicit nomenclature Bioelectric wound dressing, links the device to K180533 and reports a single-use prescription product In Commercial Distribution. The visible public version is dated January xx.xx 2026. This supports current recorded commercial identity, not attributed sales or a Global platform share. ([accessgudid.nlm.nih.gov](https://accessgudid.nlm.nih.gov/devices/xx.xx))

3. NHS Supply Chain - Advanced Wound Care Specification

· Taxonomy evidence: Electrostimulation wound therapy is recognized, without separately establishing postoperative dressing-only demand.

4. Size and distribution of the global volume of surgery in 2012.

· Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

5. Solventum Corporation - 2025 Form 10-K

· Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

6. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

7. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

8. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

9. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

10. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

11. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

13. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
14. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
15. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

16. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
17. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
18. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
19. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
20. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
21. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
22. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.

23. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
24. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

8.4. Topical Oxygen Therapy

Table 71. Global Post-Operative Wound Dressings Market Size, by Topical Oxygen Therapy, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 72. Global Post-Operative Wound Dressings Market Size, by Topical Oxygen Therapy, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 73. Global Post-Operative Wound Dressings Market Size, by Topical Oxygen Therapy, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA Product Classification - Wound Dressings Containing Oxygen

   · Taxonomy evidence: FDA product code SIL recognizes oxygen-containing wound dressings for external skin wounds. The category does not establish authorization in every country or actual postoperative sales. ([accessdata.fda.gov](https://www.accessdata.fda.gov/scripts/cdrh/cfdocs/cfPCD/classification.cfm?id=SIL))

2. OxyBand Technologies - FDA Clearance

   · Taxonomy evidence: The company's prescription oxygen-delivering dressing listing includes closed surgical incisions and skin-graft donor sites, corroborating a postoperative finished-dressing use case without establishing market size or comparative efficacy. ([oxyband.com](https://oxyband.com/Research/OxyBand-FDA.php))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.

3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
5. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
7. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
8. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
20. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

9. Post-Operative Wound Dressings Market, by Antimicrobial Technology

Antimicrobial Technology is a cross-cutting purchasing attribute, not a substitute for Dressing Type. An NHS-hosted wound-products list separates honey and iodine products and lists silver across several dressing constructions, alongside PHMB and chlorhexidine offerings. ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■ ■■ ■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■

Different declared functions should not be collapsed into one infection-prevention claim. The independent assessment of Leukomed Sorbact describes DACC Microbial Binding as a binding rather than a microbe-killing proposition. ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■ ■ ■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■

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Specialty categories require particularly careful separation of substrate, protective function, and treatment representation. ■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■ ■■■■■■■■■■■■■ ■■■■■ ■ ■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■■ ■■■■■ Current offering-level postoperative positioning remains unresolved where only broader classifications are documented.

Figure 12. Global Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2025 (%)

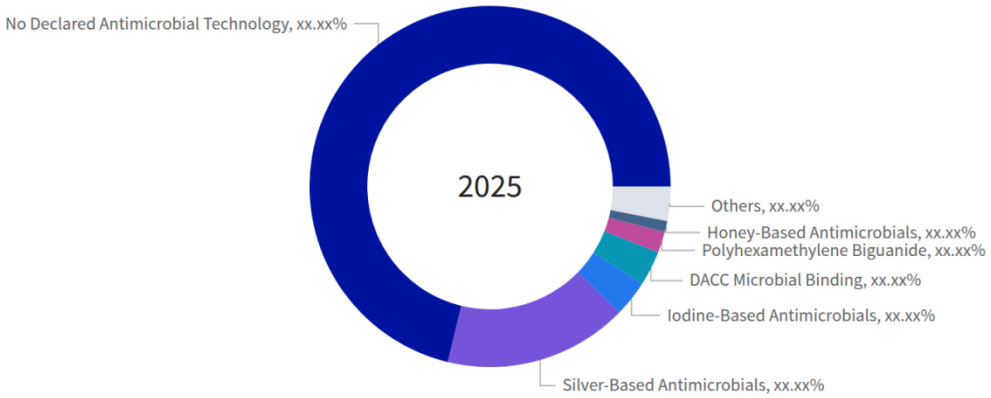


Figure 13. Global Post-Operative Wound Dressings Market, by Antimicrobial Technology, 2032 (USD Million)

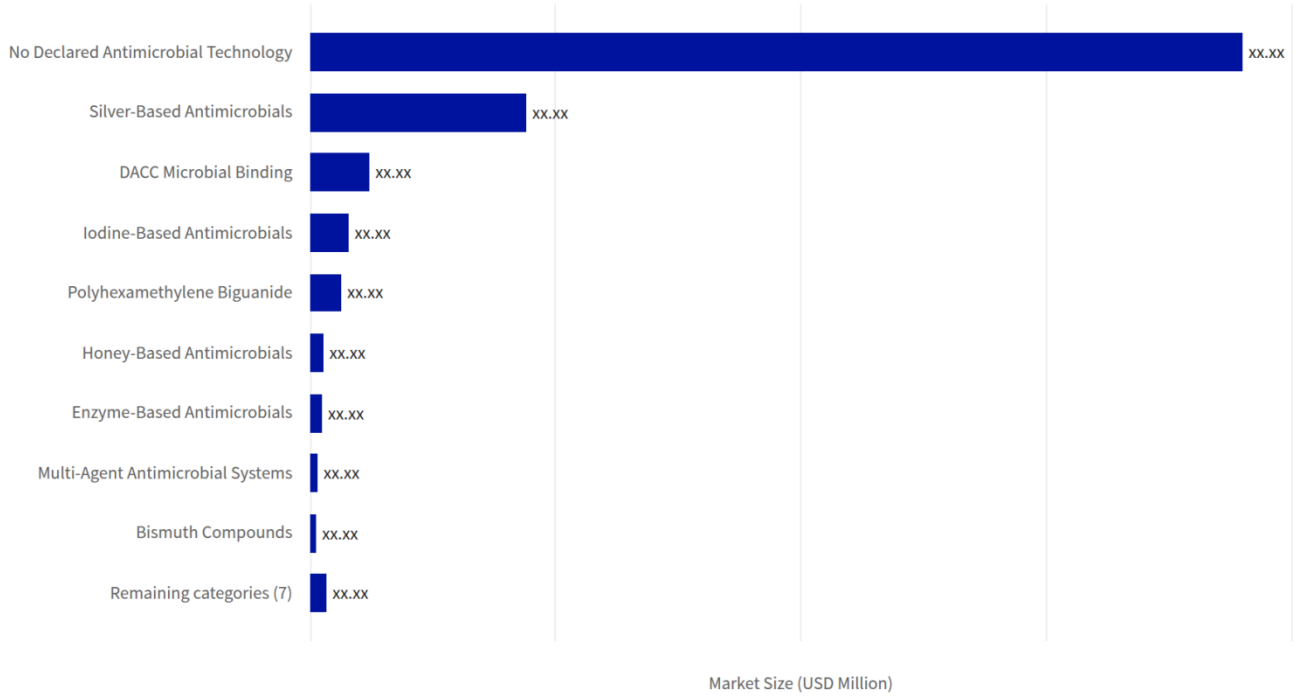


Table 74. Global Post-Operative Wound Dressings Market, by Antimicrobial Technology growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 75. Global Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings (L33831)
   - The LCD identifies materials not recognized as effective and evaluates predominant composition in multicomponent dressings; an antimicrobial label alone does not establish reimbursement. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?lcdid=xx.xx))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
2. KA01 Chitosan Wound Dressing (K143124) - 510(k) summary
   - The chitosan construction and surgical indications do not independently establish the postoperative antimicrobial positioning discussed in the narrative. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf14/K143124.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
3. Trust BNF - Wound Management Products and Elasticated Garments
   - The NHS-hosted list separates honey and iodine products, lists PHMB and chlorhexidine offerings, and identifies silver across several dressing constructions. ([primarycare.northeastlondon.icb.nhs.uk](https://primarycare.northeastlondon.icb.nhs.uk/wp-content/uploads/2024/xx.xx/Wound-management-products-and-elasticated-garments.html))
   - Taxonomy evidence: The institutional formulary organizes antimicrobial agents independently from base dressing construction; its broader wound-care scope does not establish postoperative sales. ([primarycare.northeastlondon.icb.nhs.uk](https://primarycare.northeastlondon.icb.nhs.uk/wp-content/uploads/2024/xx.xx/Wound-management-products-and-elasticated-garments.html))
4. Leukomed Sorbact for Preventing Surgical Site Infection - Supporting Documentation
   - The independent assessment describes Leukomed Sorbact's DACC function as microbial binding rather than killing. ([nice.org.uk](https://www.nice.org.uk/guidance/HTG567/documents/supporting-documentation))
   - Taxonomy evidence: The assessment separates the DACC contact technology from the absorbent pad, adhesive film and postoperative application. It supports treating microbial-binding technology as a cross-cutting allocation rather than a substitute dressing-construction family. ([nice.org.uk](https://www.nice.org.uk/guidance/HTG567/documents/supporting-documentation))

5. Hydrofera Blue READY-Border (K190268) - FDA clearance letter and 510(k) summary
   · Hydrofera Blue READY-Border is a foam dressing with gentian violet and methylene blue antibacterial components and post-surgical-incision indications. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf19/K190268.pdf))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
6. octenilin wound gel
   · Schülke describes octenidine as a preservative with a protective role in the gel; the published page does not explicitly identify a postoperative indication. ([schuelke.com](https://www.schuelke.com/en-uk/products/xx.xx/octenilin-wound-gel/))
7. Wound Dressings Containing Drugs - FDA Executive Summary, September 2016
   · FDA's historical review distinguishes preservation, dressing protection, and differing indication statements; it does not establish current authorization for every named ingredient or product. ([fda.gov](https://www.fda.gov/media/xx.xx/download))
   · Taxonomy evidence: The regulatory overview separates dressing substrates from antimicrobial additives and distinguishes antimicrobial claims from passive protection. It is a historical category reference, not current market-share evidence. ([fda.gov](https://www.fda.gov/media/xx.xx/download))
8. MedCu - Advanced Copper-Based Wound Dressings
   · MedCu presents its own copper-based dressings for surgical wounds; the portfolio does not establish payer acceptance. ([medcu.com](https://medcu.com/us))
9. NHS Supply Chain - Advanced Wound Care Specification
   · Taxonomy evidence: Antimicrobial properties occur across material-based dressing families rather than constituting one base construction.
10. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
11. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
12. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
13. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

14. Smith+Nephew Second Quarter and First Half 2026 Results

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

15. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

16. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

17. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel pricing supplies the chitosan commercial-price comparison.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel pricing supplies the chitosan commercial-price comparison.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Octenilin gel pricing anchors the modeled finished-gel realization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Octenilin gel pricing anchors the modeled finished-gel realization.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flaminal prices support a distinct enzyme-gel value comparison.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flaminal prices support a distinct enzyme-gel value comparison.

19. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
20. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
21. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
22. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.

23. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
24. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
25. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
26. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
27. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
28. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.

9.1. No Declared Antimicrobial Technology

Table 76. Global Post-Operative Wound Dressings Market Size, by No Declared Antimicrobial Technology, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 77. Global Post-Operative Wound Dressings Market Size, by No Declared Antimicrobial Technology, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 78. Global Post-Operative Wound Dressings Market Size, by No Declared Antimicrobial Technology, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA Executive Summary - Classification of Wound Dressings Containing Drugs, September 20-21, 2016
   · Taxonomy evidence: Drug-free gauze, hydrophilic, occlusive and hydrogel classifications are distinguished from antimicrobial-containing dressings.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.

19. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
20. CMS Local Coverage Determination - Surgical Dressings, L33831
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.

9.2. Silver-Based Antimicrobials

Table 79. Global Post-Operative Wound Dressings Market Size, by Silver-Based Antimicrobials, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 80. Global Post-Operative Wound Dressings Market Size, by Silver-Based Antimicrobials, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 81. Global Post-Operative Wound Dressings Market Size, by Silver-Based Antimicrobials, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA Executive Summary - Classification of Wound Dressings Containing Drugs, September 20-21, 2016
   · Taxonomy evidence: Identifies silver among antimicrobial additives to solid wound dressings.
2. Trust BNF - Wound Management Products and Elasticated Garments
   · Taxonomy evidence: Lists silver-containing alginate, foam, low-adherence and hydrocolloid dressing families.
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
5. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.

20. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.

21. CMS Local Coverage Determination - Surgical Dressings, L33831

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.

9.3. Iodine-Based Antimicrobials

Table 82. Global Post-Operative Wound Dressings Market Size, by Iodine-Based Antimicrobials, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 83. Global Post-Operative Wound Dressings Market Size, by Iodine-Based Antimicrobials, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 84. Global Post-Operative Wound Dressings Market Size, by Iodine-Based Antimicrobials, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Trust BNF - Wound Management Products and Elasticated Garments
   · Taxonomy evidence: Separately lists cadexomer-iodine preparations and povidone-iodine fabric dressings.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.

9.4. DACC Microbial Binding

Table 85. Global Post-Operative Wound Dressings Market Size, by DACC Microbial Binding, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 86. Global Post-Operative Wound Dressings Market Size, by DACC Microbial Binding, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 87. Global Post-Operative Wound Dressings Market Size, by DACC Microbial Binding, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Leukomed Sorbact - Supporting Documentation, Independent External Assessment, August 2020
   · Taxonomy evidence: The independent assessment's technology overview identifies a single-use postoperative DACC bacteria-binding dressing and distinguishes its binding function from killing microorganisms. This directly supports the retained microbial-binding category without claiming chemical biocidal equivalence or adopting an efficacy estimate. ([nice.org.uk](https://www.nice.org.uk/guidance/HTG567/documents/supporting-documentation))
2. Drug Tariff Part IX - October 2026
   · Taxonomy evidence: Explicitly identifies DACC-impregnated contact and pad products; the listing alone does not establish postoperative labeling or chemical biocidal action.
3. Trust BNF - Wound Management Products and Elasticated Garments
   · Taxonomy evidence: Lists Cutimed Sorbact within antimicrobial wound-care products; this grouping does not establish chemical biocidal action.
4. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

5. Solventum Corporation - 2025 Form 10-K

· Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

6. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

7. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

8. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

9. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

10. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

11. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

13. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
14. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
15. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

16. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
17. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
18. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
19. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
20. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.

9.5. Polyhexamethylene Biguanide

Table 88. Global Post-Operative Wound Dressings Market Size, by Polyhexamethylene Biguanide, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 89. Global Post-Operative Wound Dressings Market Size, by Polyhexamethylene Biguanide, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 90. Global Post-Operative Wound Dressings Market Size, by Polyhexamethylene Biguanide, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA Executive Summary - Classification of Wound Dressings Containing Drugs, September 20-21, 2016
   - Taxonomy evidence: Identifies PHMB as an antimicrobial dressing additive.
2. Trust BNF - Wound Management Products and Elasticated Garments
   - Taxonomy evidence: Lists Suprasorb X+PHMB as an antimicrobial dressing.

3. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

4. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
20. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.

9.6. Honey-Based Antimicrobials

Table 91. Global Post-Operative Wound Dressings Market Size, by Honey-Based Antimicrobials, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 92. Global Post-Operative Wound Dressings Market Size, by Honey-Based Antimicrobials, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 93. Global Post-Operative Wound Dressings Market Size, by Honey-Based Antimicrobials, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Trust BNF - Wound Management Products and Elasticated Garments
   · Taxonomy evidence: Lists honey sheet dressings and honey-based wound-dressing gels.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
19. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.

9.7. Enzyme-Based Antimicrobials

Table 94. Global Post-Operative Wound Dressings Market Size, by Enzyme-Based Antimicrobials, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 95. Global Post-Operative Wound Dressings Market Size, by Enzyme-Based Antimicrobials, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 96. Global Post-Operative Wound Dressings Market Size, by Enzyme-Based Antimicrobials, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Sandwell Area Formulary - Wound Management Products
   - Taxonomy evidence: The public formulary explicitly describes Flaminal Forte and Hydro as alginate gels containing antimicrobial enzymes. This independently establishes enzyme-platform terminology beyond the earlier product-name lead; the broad wound listing does not establish exact current postoperative labeling. ([sandwellandwestbhamccgformulary.nhs.uk](https://sandwellandwestbhamccgformulary.nhs.uk/chaptersSubDetails.asp?FC=xx.xx&FormularySectionID=xx.xx&SubSectionID=A100&SubSectionRef=A5))
2. Trust BNF - Wound Management Products and Elasticated Garments
   - Taxonomy evidence: Lists Flaminal Forte and Hydro among antimicrobial gels; enzyme-platform classification still requires separate support.
3. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flaminal prices support a distinct enzyme-gel value comparison.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flaminal prices support a distinct enzyme-gel value comparison.
20. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.

9.8. Bismuth Compounds

Table 97. Global Post-Operative Wound Dressings Market Size, by Bismuth Compounds, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 98. Global Post-Operative Wound Dressings Market Size, by Bismuth Compounds, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 99. Global Post-Operative Wound Dressings Market Size, by Bismuth Compounds, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA Executive Summary - Classification of Wound Dressings Containing Drugs, September 20-21, 2016
   - Taxonomy evidence: Identifies bismuth as an antimicrobial dressing additive.
2. FDA K152970 - Dynarex Xeroform Petrolatum Dressing
   - Taxonomy evidence: The regulatory summary describes a bismuth-containing nonadherent gauze dressing with newly sutured and surgical-wound applications. It does not establish every bismuth dressing's antimicrobial claim. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf15/K152970.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
3. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

4. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

9.9. Multi-Agent Antimicrobial Systems

Table 100. Global Post-Operative Wound Dressings Market Size, by Multi-Agent Antimicrobial Systems, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 101. Global Post-Operative Wound Dressings Market Size, by Multi-Agent Antimicrobial Systems, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 102. Global Post-Operative Wound Dressings Market Size, by Multi-Agent Antimicrobial Systems, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K190268 - Hydrofera Blue READY-Border: 510(k) Summary

   · Taxonomy evidence: The 2019 regulatory summary identifies methylene blue and gentian violet as antibacterial dyes in one finished dressing and includes post-surgical incisions among its indications. This directly establishes a postoperative dual-agent example for the commercial combination category without relying on drug-device combination status.
   ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf19/K190268.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.

2. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

3. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.
9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.

9.10. Antibiotics

Table 103. Global Post-Operative Wound Dressings Market Size, by Antibiotics, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 104. Global Post-Operative Wound Dressings Market Size, by Antibiotics, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 105. Global Post-Operative Wound Dressings Market Size, by Antibiotics, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA Executive Summary - Classification of Wound Dressings Containing Drugs, September 20-21, 2016
   · Taxonomy evidence: Identifies bacitracin among antimicrobial additives to solid dressings.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.

9.11. Chlorhexidine

Table 106. Global Post-Operative Wound Dressings Market Size, by Chlorhexidine, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 107. Global Post-Operative Wound Dressings Market Size, by Chlorhexidine, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 108. Global Post-Operative Wound Dressings Market Size, by Chlorhexidine, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA Executive Summary - Classification of Wound Dressings Containing Drugs, September 20-21, 2016
   · Taxonomy evidence: Identifies chlorhexidine as an antimicrobial dressing additive.
2. Trust BNF - Wound Management Products and Elasticated Garments
   · Taxonomy evidence: Lists chlorhexidine gauze dressings under antimicrobials.
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.

9.12. Octenidine

Table 109. Global Post-Operative Wound Dressings Market Size, by Octenidine, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 110. Global Post-Operative Wound Dressings Market Size, by Octenidine, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 111. Global Post-Operative Wound Dressings Market Size, by Octenidine, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Schülke UK - octenilin Wound Gel

   · Taxonomy evidence: The manufacturer's UK description explicitly identifies octenidine as a preservative with an antimicrobial protective role in the wound gel. Its listed applications concern chronic wounds and burns, not an explicit postoperative indication. This resolves the ingredient lead only; it does not independently prove market-level category coverage or postoperative eligibility.
   ([schuelke.com](https://www.schuelke.com/en-uk/products/xx.xx/octenilin-wound-gel/))

2. Trust BNF - Wound Management Products and Elasticated Garments

   · Taxonomy evidence: Lists Octenilin Wound Gel as an antimicrobial product; the page does not establish its octenidine ingredient or postoperative label.

3. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

4. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Octenilin gel pricing anchors the modeled finished-gel realization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Octenilin gel pricing anchors the modeled finished-gel realization.
20. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.

9.13. Quaternary Ammonium Compounds

Table 112. Global Post-Operative Wound Dressings Market Size, by Quaternary Ammonium Compounds, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 113. Global Post-Operative Wound Dressings Market Size, by Quaternary Ammonium Compounds, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 114. Global Post-Operative Wound Dressings Market Size, by Quaternary Ammonium Compounds, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA Executive Summary - Classification of Wound Dressings Containing Drugs, September 20-21, 2016
   · Taxonomy evidence: Recognizes pDADMAC-containing dressings and cites a surgical-wound indication.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
19. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.

9.14. Copper-Based Antimicrobials

Table 115. Global Post-Operative Wound Dressings Market Size, by Copper-Based Antimicrobials, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 116. Global Post-Operative Wound Dressings Market Size, by Copper-Based Antimicrobials, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 117. Global Post-Operative Wound Dressings Market Size, by Copper-Based Antimicrobials, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. MEDCU - Advanced Copper-Based Wound Dressings
   · Taxonomy evidence: The official US portfolio is explicitly presented as copper-based wound dressings. This establishes an own-product commercial category, not the completeness of the market partition or quantified postoperative demand. ([medcu.com](https://medcu.com/us/))
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

19. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
20. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.

9.15. Chitosan-Based Antimicrobials

Table 118. Global Post-Operative Wound Dressings Market Size, by Chitosan-Based Antimicrobials, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 119. Global Post-Operative Wound Dressings Market Size, by Chitosan-Based Antimicrobials, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 120. Global Post-Operative Wound Dressings Market Size, by Chitosan-Based Antimicrobials, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K143124 - KA01 Chitosan Wound Dressing
   - Taxonomy evidence: Chitosan construction and surgical applications are documented, but this record does not establish the antimicrobial positioning required for this technology allocation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
2. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel pricing supplies the chitosan commercial-price comparison.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel pricing supplies the chitosan commercial-price comparison.
19. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.

10. Post-Operative Wound Dressings Market, by Healing Pathway

Healing Pathway separates purchasing objectives that cannot be inferred from the word surgical alone. The National Wound Care Strategy Programme distinguishes primary closure, secondary-intention healing, and delayed surgical closure. ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■

For Open Wounds Healing by Secondary Intention, standard dressings remain a necessary commercial comparator. ■■■ ■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■ The result supports pathway-specific comparison, not rejection of every NPWT application or every postoperative population.

Open Wounds Awaiting Surgical Closure create an interim procurement question because further closure is planned, whereas secondary-intention wounds have a different endpoint. ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■ ■■■■■■ ■■ ■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■ This stage-based approach adds coordination but avoids treating a temporary supply decision as an indefinite selection.

Figure 14. Global Post-Operative Wound Dressings Market Size, by Healing Pathway, 2025 (%)

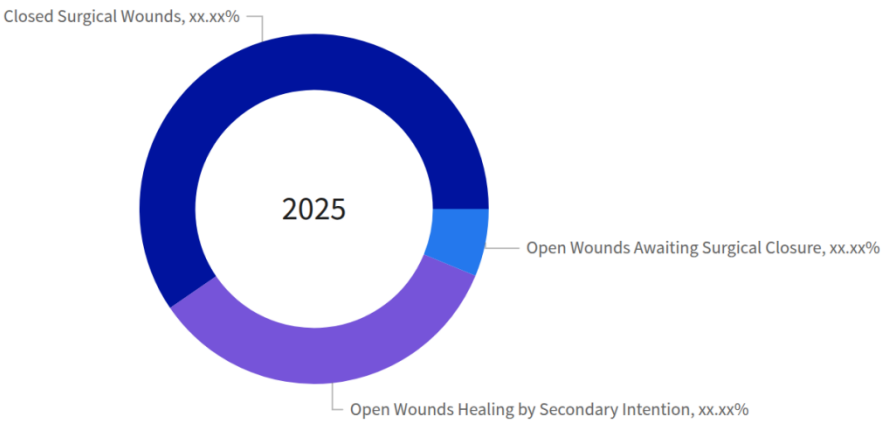


Figure 15. Global Post-Operative Wound Dressings Market, by Healing Pathway, 2032 (USD Million)

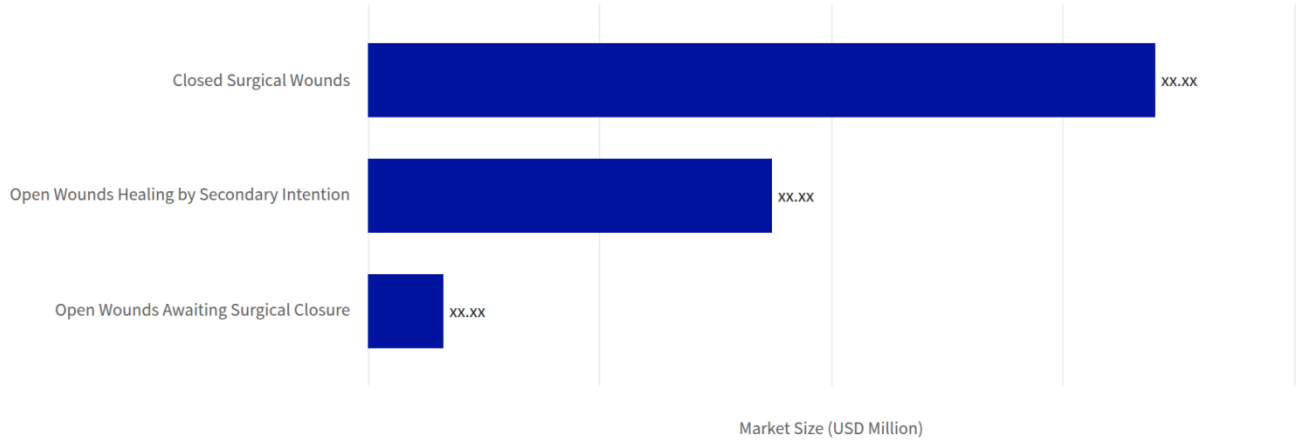


Table 121. Global Post-Operative Wound Dressings Market, by Healing Pathway growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 122. Global Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2)

   · SWHSI-xx.xx found no clear healing-time advantage and found NPWT not cost-effective against usual care in its predominantly lower-limb vascular-surgery population. ([pubmed.ncbi.nlm.nih.gov](https://pubmed.ncbi.nlm.nih.gov/xx.xx/))

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

2. OxyBand Technologies - FDA Clearance

   · The published prescription indication identifies a closed-incision application, not automatic eligibility for both open-wound pathways. ([oxyband.com](https://oxyband.com/Research/OxyBand-FDA.php))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.

3. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
   - The May 2024 glossary distinguishes primary closure, secondary-intention healing, and delayed surgical closure, supporting separate commercial review boundaries. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
   - Taxonomy evidence: The May 2024 glossary distinguishes primary, secondary and tertiary healing, supporting three pathway concepts rather than a separate dehiscence sibling. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
4. Surgical Site Infection Event - January 2026
   - Taxonomy evidence: Its procedure-level primary-closure flag can include partly closed incisions; it is not equivalent to current wound-level pathway allocation. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
5. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
6. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
7. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
8. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

9. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

10. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

11. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.

12. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
13. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

14. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
15. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

10.1. Closed Surgical Wounds

Table 123. Global Post-Operative Wound Dressings Market Size, by Closed Surgical Wounds, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 124. Global Post-Operative Wound Dressings Market Size, by Closed Surgical Wounds, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 125. Global Post-Operative Wound Dressings Market Size, by Closed Surgical Wounds, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
   · Taxonomy evidence: Primary-intention healing is identified with surgical wound closure, establishing the closed-wound category's clinical identity. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
6. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
7. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.
9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.

19. **The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
20. **Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
21. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
22. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.

10.2. Open Wounds Healing by Secondary Intention

Table 126. Global Post-Operative Wound Dressings Market Size, by Open Wounds Healing by Secondary Intention, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 127. Global Post-Operative Wound Dressings Market Size, by Open Wounds Healing by Secondary Intention, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 128. Global Post-Operative Wound Dressings Market Size, by Open Wounds Healing by Secondary Intention, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
   · Taxonomy evidence: Secondary-intention healing includes open surgical wounds and dehisced wounds not subsequently closed surgically. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
6. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
7. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.
9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
19. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
20. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
21. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
22. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.

10.3. Open Wounds Awaiting Surgical Closure

Table 129. Global Post-Operative Wound Dressings Market Size, by Open Wounds Awaiting Surgical Closure, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 130. Global Post-Operative Wound Dressings Market Size, by Open Wounds Awaiting Surgical Closure, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 131. Global Post-Operative Wound Dressings Market Size, by Open Wounds Awaiting Surgical Closure, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024

   · Taxonomy evidence: Tertiary-intention healing is expressly identified as delayed surgical closure, supporting the awaiting-closure category. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

2. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

3. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.

19. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
20. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
21. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
22. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

11. Post-Operative Wound Dressings Market, by Surgical Application

Surgical Application should guide evidence and account selection rather than serve as a proxy for uniform dressing demand. Within Musculoskeletal Surgery, the 2020 elective hip-and-knee replacement comparison of Mepilex Border Post-Op and Aquacel Surgical supports attention to handling and patient experience, while reporting low dressing failure with both offerings. ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■

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Ophthalmic Surgery illustrates why an operation does not necessarily imply a particular dressing purchase. Guy's and St Thomas' describes an eye pad and shield, or a shield alone, after cataract surgery. ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■

Across the remaining surgical applications, a general surgical-wound indication should remain distinct from specialty-specific comparative evidence and customer acceptance. Before committing to a specialty launch, a supplier should connect the exact offering to the relevant procedure context, permitted proposition, and institutional purchasing decision. ■■■■■ ■■■■■ ■■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■ ■■■■ ■■■■■■■■■■ ■■■■ ■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■

Figure 16. Global Post-Operative Wound Dressings Market Size, by Surgical Application, 2025 (%)

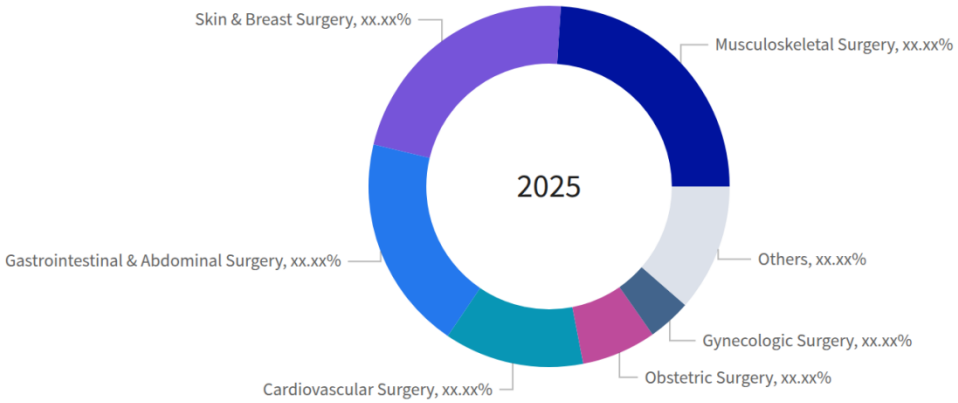


Figure 17. Global Post-Operative Wound Dressings Market, by Surgical Application, 2032 (USD Million)

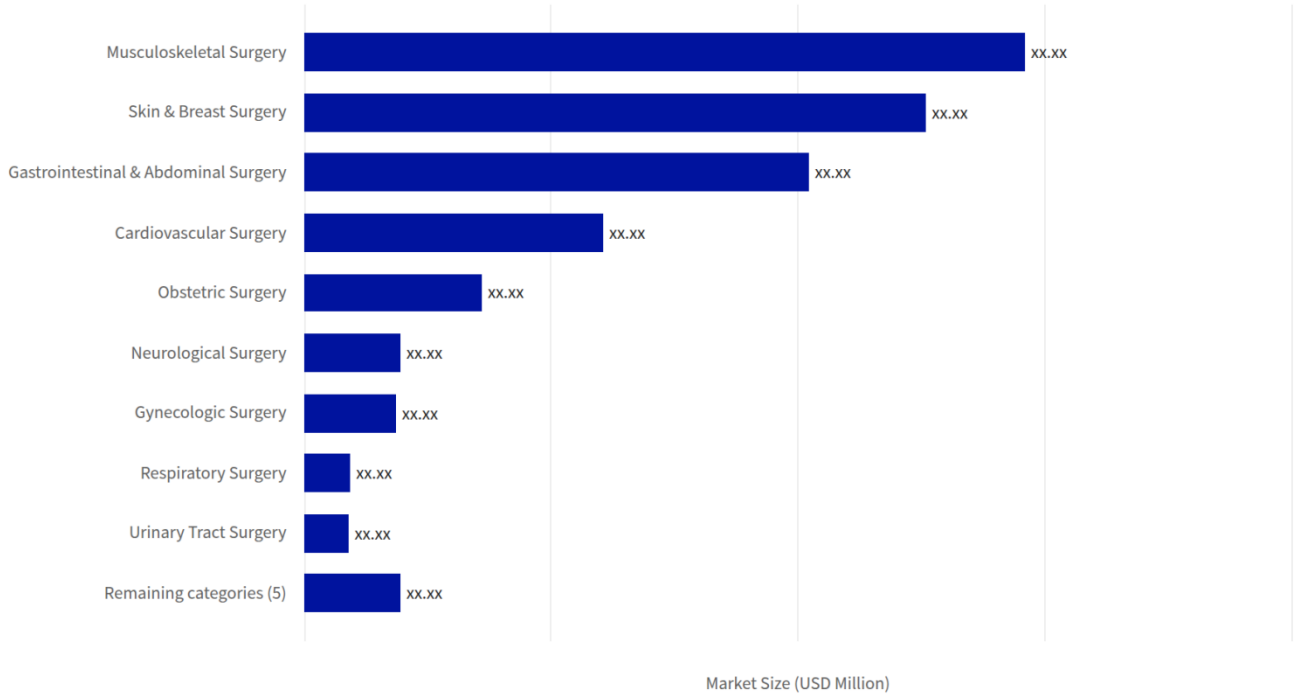


Table 132. Global Post-Operative Wound Dressings Market, by Surgical Application growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 133. Global Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement...
   - The 2020 arthroplasty comparison reports low failure with both dressings and favors Mepilex Border Post-Op on handling and patient-experience measures. ([biblio.ugent.be](https://biblio.ugent.be/publication/xx.xx))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
2. NeoMatriX Wound Matrix (K210024) - FDA clearance letter and 510(k) summary
   - The indications include donor sites, grafts, and post-Mohs wounds; they do not establish comparative specialty-wide benefit. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf21/K210024.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.

3. Leukomed Sorbact for Preventing Surgical Site Infection - Supporting Documentation
   · The August 2020 assessment examines caesarean-section and vascular-surgery evidence and identifies limitations in wider surgical transfer.
   ([nice.org.uk](https://www.nice.org.uk/guidance/HTG567/documents/supporting-documentation))
4. Cataract surgery - After cataract surgery
   · The provider's cataract information describes an eye pad and shield, or a shield alone, establishing that pad use is not universal in that pathway.
   ([guysandstthomas.nhs.uk](https://www.guysandstthomas.nhs.uk/health-information/cataract-surgery/after-cataract-surgery))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
5. International Classification of Health Interventions (ICHI)
   · Taxonomy evidence: ICHI separates intervention Target, Action and Means and covers surgical interventions. This supports a procedure-based analytical axis; the proposed commercial groupings are an adaptation, not an official ICHI reproduction.
   ([who.int](https://www.who.int/standards/classifications/international-classification-of-health-interventions))
6. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: The appendix organizes surgery by body system. Its 2014 US hospital observations establish classification terminology, not Global 2025 dressing demand.
   ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
7. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: The January 2026 procedure categories corroborate distinct operative targets; surveillance categories are not adopted as the complete Global commercial taxonomy.
   ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
8. FAQs: Surgical Site Procedure Codes
   · Taxonomy evidence: The hysterectomy examples demonstrate why an abdominal incision cannot by itself determine the principal surgical-application group.
   ([cdc.gov](https://www.cdc.gov/nhsn/faqs/faq-ssi-proc-codes.html))
9. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
10. Solventum Corporation - 2025 Form 10-K
    · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
    ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
11. Smith+Nephew Fourth Quarter and Full Year 2020 Results
    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
    ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

12. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

13. Smith+Nephew Second Quarter and First Half 2026 Results

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

14. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

15. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

16. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

17. NHSBSA Drug Tariff April 2025 - Part IXA

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Eye-pad price anchors the low-value basket assumption.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Eye-pad price anchors the low-value basket assumption.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Conventional/foam price dispersion supports heterogeneous baskets.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Conventional/foam price dispersion supports heterogeneous baskets.

18. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

19. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.

20. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.

11.1. Musculoskeletal Surgery

Table 134. Global Post-Operative Wound Dressings Market Size, by Musculoskeletal Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 135. Global Post-Operative Wound Dressings Market Size, by Musculoskeletal Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 136. Global Post-Operative Wound Dressings Market Size, by Musculoskeletal Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Identifies musculoskeletal operations, including joint replacement, amputation and fusion. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: Lists fracture repair, joint prosthesis, amputation and spinal fusion. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Conventional/foam price dispersion supports heterogeneous baskets.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Conventional/foam price dispersion supports heterogeneous baskets.
20. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
21. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
22. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.

11.2. Skin & Breast Surgery

Table 137. Global Post-Operative Wound Dressings Market Size, by Skin & Breast Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 138. Global Post-Operative Wound Dressings Market Size, by Skin & Breast Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 139. Global Post-Operative Wound Dressings Market Size, by Skin & Breast Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: The integumentary group includes skin and breast operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: Lists breast surgery as an operative category. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
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13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.
20. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
21. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
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22. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.

11.3. Gastrointestinal & Abdominal Surgery

Table 140. Global Post-Operative Wound Dressings Market Size, by Gastrointestinal & Abdominal Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 141. Global Post-Operative Wound Dressings Market Size, by Gastrointestinal & Abdominal Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 142. Global Post-Operative Wound Dressings Market Size, by Gastrointestinal & Abdominal Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Groups digestive operations and hernia repairs together. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
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4. Solventum Corporation - 2025 Form 10-K
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5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.
20. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
21. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.

11.4. Cardiovascular Surgery

Table 143. Global Post-Operative Wound Dressings Market Size, by Cardiovascular Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 144. Global Post-Operative Wound Dressings Market Size, by Cardiovascular Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 145. Global Post-Operative Wound Dressings Market Size, by Cardiovascular Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Separately identifies cardiovascular operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: Lists cardiac, bypass, vascular and pacemaker operations. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.
20. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
21. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.

11.5. Obstetric Surgery

Table 146. Global Post-Operative Wound Dressings Market Size, by Obstetric Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 147. Global Post-Operative Wound Dressings Market Size, by Obstetric Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 148. Global Post-Operative Wound Dressings Market Size, by Obstetric Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Site Infection Event - January 2026
   - Taxonomy evidence: Lists cesarean section separately from hysterectomy. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
2. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Relative product prices constrain modeled expenditure baskets.

19. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.

11.6. Gynecologic Surgery

Table 149. Global Post-Operative Wound Dressings Market Size, by Gynecologic Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 150. Global Post-Operative Wound Dressings Market Size, by Gynecologic Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 151. Global Post-Operative Wound Dressings Market Size, by Gynecologic Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Separately identifies female genital-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. FAQs: Surgical Site Procedure Codes
   · Taxonomy evidence: The January xx.xx 2026 FAQ retains hysterectomy procedures within gynecologic procedure categories even when abdominal incisions or laparoscopic access are involved. This corroborates keeping operative target separate from access location. ([cdc.gov](https://www.cdc.gov/nhsn/faqs/faq-ssi-proc-codes.html))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
20. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.

11.7. Neurological Surgery

Table 152. Global Post-Operative Wound Dressings Market Size, by Neurological Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 153. Global Post-Operative Wound Dressings Market Size, by Neurological Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 154. Global Post-Operative Wound Dressings Market Size, by Neurological Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Identifies nervous-system operations, including peripheral-nerve procedures. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: Lists craniotomy and ventricular-shunt surgery. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
20. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.

11.8. Respiratory Surgery

Table 155. Global Post-Operative Wound Dressings Market Size, by Respiratory Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 156. Global Post-Operative Wound Dressings Market Size, by Respiratory Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 157. Global Post-Operative Wound Dressings Market Size, by Respiratory Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Separately identifies respiratory-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: Lists thoracic surgery separately from cardiac procedures. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
20. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.

11.9. Urinary Tract Surgery

Table 158. Global Post-Operative Wound Dressings Market Size, by Urinary Tract Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 159. Global Post-Operative Wound Dressings Market Size, by Urinary Tract Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 160. Global Post-Operative Wound Dressings Market Size, by Urinary Tract Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Separately identifies urinary-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: Lists kidney surgery and transplantation. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
20. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.

11.10. Ear, Nose, Oral & Throat Surgery

Table 161. Global Post-Operative Wound Dressings Market Size, by Ear, Nose, Oral & Throat Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 162. Global Post-Operative Wound Dressings Market Size, by Ear, Nose, Oral & Throat Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 163. Global Post-Operative Wound Dressings Market Size, by Ear, Nose, Oral & Throat Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Identifies ear and nose, mouth and pharynx operation groups. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
19. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.

11.11. Male Reproductive Surgery

Table 164. Global Post-Operative Wound Dressings Market Size, by Male Reproductive Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 165. Global Post-Operative Wound Dressings Market Size, by Male Reproductive Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 166. Global Post-Operative Wound Dressings Market Size, by Male Reproductive Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Separately identifies male genital-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: Lists prostate surgery separately from kidney surgery. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
20. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.

11.12. Hematologic & Lymphatic Surgery

Table 167. Global Post-Operative Wound Dressings Market Size, by Hematologic & Lymphatic Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 168. Global Post-Operative Wound Dressings Market Size, by Hematologic & Lymphatic Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 169. Global Post-Operative Wound Dressings Market Size, by Hematologic & Lymphatic Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Separately identifies hemic and lymphatic operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: Lists spleen surgery as a distinct operative category. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.

11.13. Ophthalmic Surgery

Table 170. Global Post-Operative Wound Dressings Market Size, by Ophthalmic Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 171. Global Post-Operative Wound Dressings Market Size, by Ophthalmic Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 172. Global Post-Operative Wound Dressings Market Size, by Ophthalmic Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   - Taxonomy evidence: Separately identifies eye operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))

2. Product Classification

   · Taxonomy evidence: FDA recognizes an eye-pad device category under product code HMP and regulation xx.xx. This establishes a dressing-category identity, not postoperative use for every eye pad. ([accessdata.fda.gov](https://www.accessdata.fda.gov/scripts/cdrh/cfdocs/cfPCD/classification.cfm?id=HMP))

3. Cataract surgery - After cataract surgery

   · Taxonomy evidence: The hospital's April 2026-reviewed information identifies an eye pad as a possible postoperative covering after cataract surgery, distinguishing that dressing use from shield-only coverage. This supports the ophthalmic application without implying universal pad use. ([guysandstthomas.nhs.uk](https://www.guysandstthomas.nhs.uk/health-information/cataract-surgery/after-cataract-surgery?utm_source=openai))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.

4. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

5. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

6. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

7. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

8. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

9. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

10. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
    - Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.
11. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

14. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
15. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
16. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
17. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
18. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
19. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
20. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Eye-pad price anchors the low-value basket assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Eye-pad price anchors the low-value basket assumption.

21. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
22. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.

11.14. Endocrine Surgery

Table 173. Global Post-Operative Wound Dressings Market Size, by Endocrine Surgery, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 174. Global Post-Operative Wound Dressings Market Size, by Endocrine Surgery, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 175. Global Post-Operative Wound Dressings Market Size, by Endocrine Surgery, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgeries in Hospital-Based Ambulatory Surgery and Hospital Inpatient Settings, 2014 - Statistical Brief 223
   · Taxonomy evidence: Separately identifies endocrine-system operations. ([hcup-us.ahrq.gov](https://hcup-us.ahrq.gov/reports/statbriefs/sb223-Ambulatory-Inpatient-Surgeries-2014.jsp))
2. Surgical Site Infection Event - January 2026
   · Taxonomy evidence: Lists thyroid and parathyroid surgery. ([cdc.gov](https://www.cdc.gov/nhsn/pdfs/pscmanual/9pscssicurrent.pdf))
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

· Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

· Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.

12. Post-Operative Wound Dressings Market, by End User

End User changes the accountable purchasing relationship, even when the dressing is unchanged. ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■ ■■■■■■ ■■■■■■■ ■■■■ ■■■ ■■■■■■ ■ ■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ Suppliers serving these centers should address the facility's complete purchasing requirements rather than assume an independently reimbursable dressing transaction.

■■■■■■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ Medicare treats dressings applied within a billed professional service as included in that service, while allowing qualifying take-home claims under the applicable benefit. The commercial implication is to identify whether the customer is purchasing for its own service or arranging a subsequent supply relationship; the location of the original selection does not answer that question.

Residential & Post-Acute Care Facilities require status-based account selection. Medicare-covered Part A skilled-nursing stays generally use consolidated billing, subject to exclusions, while noncovered stays follow different rules. ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■

Home Healthcare Providers are not interchangeable with Self-Care Households. ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■ ■ ■■■■■■■■■■■ ■■■■ ■■ ■■■■■ ■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■ ■ ■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■ Household involvement can support continuity, but it does not transfer professional or payment responsibilities automatically.

Figure 18. Global Post-Operative Wound Dressings Market Size, by End User, 2025 (%)

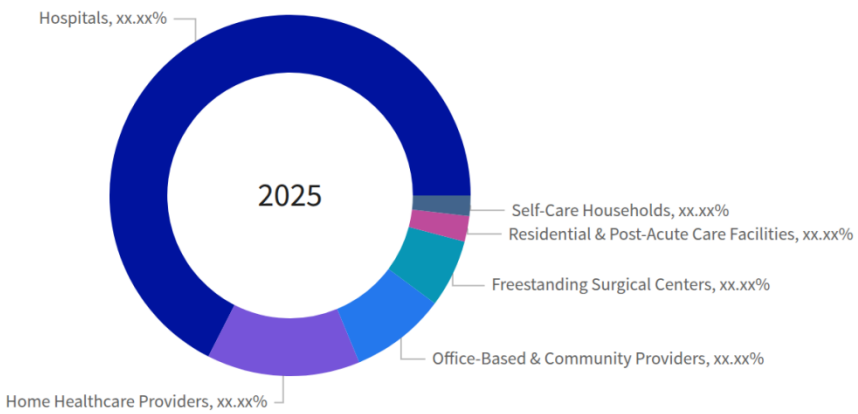


Figure 19. Global Post-Operative Wound Dressings Market, by End User, 2032 (USD Million)

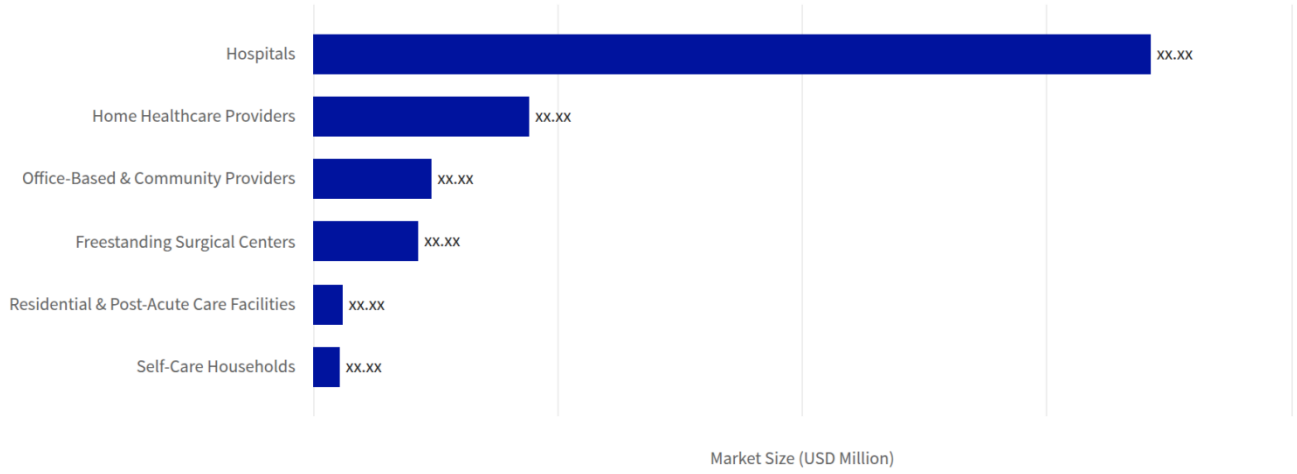


Table 176. Global Post-Operative Wound Dressings Market, by End User growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 177. Global Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)

   · Professional-service dressings are not separately payable; eligible take-home supplies may follow the applicable claims route.
   ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.

2. V.A.C. Therapy patient support

   · Solventum states that missing professional documentation can prevent V.A.C. insurance billing and lead to equipment collection or personal payment arrangements.
   ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.

3. Advanced Wound Care

   · Catalog purchasing and dedicated acute-care support establish an institutional purchasing route, not a uniform payment model.
   ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care))

4. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
   - Medicare includes surgical dressings within ASC facility services and distinguishes subsequent eligible patient supplies obtained on a physician's order. ([cms.gov](https://www.cms.gov/regulations-and-guidance/guidance/manuals/downloads/clm104c14.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
5. SNF Consolidated Billing
   - Covered Part A SNF stays generally use consolidated billing, subject to exclusions; noncovered stays have different billing treatment. ([cms.gov](https://www.cms.gov/medicare/coding-billing/skilled-nursing-facility-snf-consolidated-billing))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
6. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
   - Ordinary medical supplies are bundled during a Medicare home-health plan of care, while DME and related supplies are treated separately. ([cms.gov](https://www.cms.gov/regulations-and-guidance/guidance/manuals/downloads/bp102c07.pdf))
   - Taxonomy evidence: Its examples recognize overlapping family and professional wound-care participation. This supports retaining an explicit responsibility rule rather than classifying every home episode as household self-care. ([cms.gov](https://www.cms.gov/regulations-and-guidance/guidance/manuals/downloads/bp102c07.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.

7. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
· Taxonomy evidence: The postoperative pathway includes transfer between surgical teams, subsequent providers and supported self-management, establishing that final users extend beyond the operating institution.
([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))
8. Key classifications of the System of Health Accounts 2011 - Best Practice in Institutionalising Health Accounts
· Taxonomy evidence: The international provider classification distinguishes hospitals, residential care, ambulatory providers, home healthcare, retailers and households. It also separates provider classification from financing schemes, supporting exclusion of payers and resellers from this final-user axis.
([oecd.org](https://www.oecd.org/en/publications/best-practice-in-institutionalising-health-accounts_cf997130-en/full-report/key-classifications-of-the-system-of-health-accounts-2011_a2857acf.html))
9. Size and distribution of the global volume of surgery in 2012.
· Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
10. Solventum Corporation - 2025 Form 10-K
· Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
11. Smith+Nephew Fourth Quarter and Full Year 2020 Results
· Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
12. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
· Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
13. Smith+Nephew Second Quarter and First Half 2026 Results
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
14. Convatec - Interim Results for the Six Months Ended 30 June 2026
· Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

15. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

16. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

17. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

18. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

19. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
20. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.

21. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

12.1. Hospitals

Table 178. Global Post-Operative Wound Dressings Market Size, by Hospitals, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 179. Global Post-Operative Wound Dressings Market Size, by Hospitals, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 180. Global Post-Operative Wound Dressings Market Size, by Hospitals, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. A System of Health Accounts 2011

   · Taxonomy evidence: The provider manual keeps integrated hospital ambulatory services within hospitals rather than freestanding ambulatory establishments. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2011/xx.xx/a-system-of-health-accounts_g1g13e12/xx.xx-en.pdf))

2. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

3. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

4. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.

19. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

20. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.

21. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.

22. NHS Supply Chain - National Pricing Matrices
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.

12.2. Home Healthcare Providers

Table 181. Global Post-Operative Wound Dressings Market Size, by Home Healthcare Providers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 182. Global Post-Operative Wound Dressings Market Size, by Home Healthcare Providers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 183. Global Post-Operative Wound Dressings Market Size, by Home Healthcare Providers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. A System of Health Accounts 2011
   - Taxonomy evidence: HP.xx.xx identifies home-healthcare establishments, including community nurses, domiciliary nursing and home-healthcare agencies. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2011/xx.xx/a-system-of-health-accounts_g1g13e12/xx.xx-en.pdf))
2. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
   - Taxonomy evidence: The home-health manual explicitly identifies postoperative wound aftercare and dressing supplies within home-health services, establishing a professional home-care role. ([cms.gov](https://www.cms.gov/regulations-and-guidance/guidance/manuals/downloads/bp102c07.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.

3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
5. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
7. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
8. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

19. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
20. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.

12.3. Office-Based & Community Providers

Table 184. Global Post-Operative Wound Dressings Market Size, by Office-Based & Community Providers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 185. Global Post-Operative Wound Dressings Market Size, by Office-Based & Community Providers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 186. Global Post-Operative Wound Dressings Market Size, by Office-Based & Community Providers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Key classifications of the System of Health Accounts 2011 - Best Practice in Institutionalising Health Accounts
   - Taxonomy evidence: Medical practices, dental practices, healthcare practitioners and ambulatory centers are recognized provider groups, supporting the proposed outpatient/community aggregation. ([oecd.org](https://www.oecd.org/en/publications/best-practice-in-institutionalising-health-accounts_cf997130-en/full-report/key-classifications-of-the-system-of-health-accounts-2011_a2857acf.html))
2. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
   - Taxonomy evidence: The manual separately recognizes surgical dressings furnished with physician-office services, supporting an office-based user category distinct from ASCs. ([edit.cms.gov](https://edit.cms.gov/Regulations-and-Guidance/Guidance/Manuals/Downloads/clm104c14.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
3. Sirona (BNSSG) Wound Management Formulary and Dressing Guide - Version 3, January 2025
   - Taxonomy evidence: The January 2025 public formulary lists surgical-wound dressings available for ordering by GP and practice-nurse teams, providing a market-specific outpatient purchasing-role anchor. It does not establish realized use volumes. ([remedy.bnssg.icb.nhs.uk](https://remedy.bnssg.icb.nhs.uk/media/ghxbkml3/sirona-wound-management-formulary-and-dressing-guide-jan-2025.pdf))

4. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
5. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
6. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
7. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
8. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
9. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
10. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

11. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

13. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
14. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
15. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

16. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
17. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
18. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
19. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
20. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
21. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
22. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

12.4. Freestanding Surgical Centers

Table 187. Global Post-Operative Wound Dressings Market Size, by Freestanding Surgical Centers, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 188. Global Post-Operative Wound Dressings Market Size, by Freestanding Surgical Centers, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 189. Global Post-Operative Wound Dressings Market Size, by Freestanding Surgical Centers, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. A System of Health Accounts 2011

   · Taxonomy evidence: HP.xx.xx.xx.xx identifies freestanding ambulatory surgery centers as specialized outpatient surgical establishments, distinct from hospitals and ordinary medical practices. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2011/xx.xx/a-system-of-health-accounts_g1g13e12/xx.xx-en.pdf))

2. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers

   · Taxonomy evidence: The manual identifies surgical dressings among ASC facility services, establishing a direct institutional dressing-use role rather than a resale-only role. ([cms.gov](https://www.cms.gov/regulations-and-guidance/guidance/manuals/downloads/clm104c14.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.

3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
5. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
7. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
8. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
20. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
21. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.

12.5. Residential & Post-Acute Care Facilities

Table 190. Global Post-Operative Wound Dressings Market Size, by Residential & Post-Acute Care Facilities, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 191. Global Post-Operative Wound Dressings Market Size, by Residential & Post-Acute Care Facilities, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 192. Global Post-Operative Wound Dressings Market Size, by Residential & Post-Acute Care Facilities, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. A System of Health Accounts 2011

   · Taxonomy evidence: Residential nursing examples include nursing homes, skilled nursing facilities, convalescent homes and inpatient hospices, supporting the nonhospital residential/post-acute grouping. ([oecd.org](https://www.oecd.org/content/dam/oecd/en/publications/reports/2011/xx.xx/a-system-of-health-accounts_g1g13e12/xx.xx-en.pdf))

2. Sirona (BNSSG) Wound Management Formulary and Dressing Guide - Version 3, January 2025

   · Taxonomy evidence: The same surgical-wound dressing section names nursing homes among permitted ordering organizations, independently establishing a residential-care purchasing role without inferring Global buyer shares. ([remedy.bnssg.icb.nhs.uk](https://remedy.bnssg.icb.nhs.uk/media/ghxbkml3/sirona-wound-management-formulary-and-dressing-guide-jan-2025.pdf))

3. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

4. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
20. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

12.6. Self-Care Households

Table 193. Global Post-Operative Wound Dressings Market Size, by Self-Care Households, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 194. Global Post-Operative Wound Dressings Market Size, by Self-Care Households, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 195. Global Post-Operative Wound Dressings Market Size, by Self-Care Households, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024

   · Taxonomy evidence: Supported postoperative self-management and patient-held dressing supplies are explicitly recognized; this establishes a household-use pathway, not its market share. ([hwetraininghub.org.uk](https://www.hwetraininghub.org.uk/storage/nwcsp-surgical-wound-complications-recommendations-xx.xx.xx.xx.pdf))

2. Key classifications of the System of Health Accounts 2011 - Best Practice in Institutionalising Health Accounts

   · Taxonomy evidence: Households providing home healthcare are distinguished from professional provider establishments and medical-goods retailers. The proposed self-care boundary is a commercial adaptation. ([oecd.org](https://www.oecd.org/en/publications/best-practice-in-institutionalising-health-accounts_cf997130-en/full-report/key-classifications-of-the-system-of-health-accounts-2011_a2857acf.html))

3. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
   · Taxonomy evidence: Postoperative dressings may subsequently be used by patients or family members and obtained from suppliers. The supplying drugstore and the household user therefore represent different commercial roles.
   ([edit.cms.gov](https://edit.cms.gov/Regulations-and-Guidance/Guidance/Manuals/Downloads/clm104c14.pdf))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
4. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
5. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
6. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
7. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
8. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
9. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
10. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

11. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

13. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
14. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
15. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
18. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
19. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
20. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
21. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
22. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.

23. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.

13. Post-Operative Wound Dressings Market, by Sales Channel

[illegible] A distributor route is useful when the partner holds the relevant customer relationship and maintains the required records; direct supply retains control of that interface and the associated work. Neither arrangement substitutes for product acceptance.

[illegible] Suppliers should identify the purchasing principal before classifying a home-delivery relationship. This distinction matters when comparing institutional contracting with household ordering, particularly where the institution controls the formulary.

Retail & Dispensing and Direct-to-Consumer Sales can coexist within a supplier's commercial model. Medline identifies third-party pharmacy and retail outlets alongside its own consumer storefront. [illegible]

Figure 20. Global Post-Operative Wound Dressings Market Size, by Sales Channel, 2025 (%)

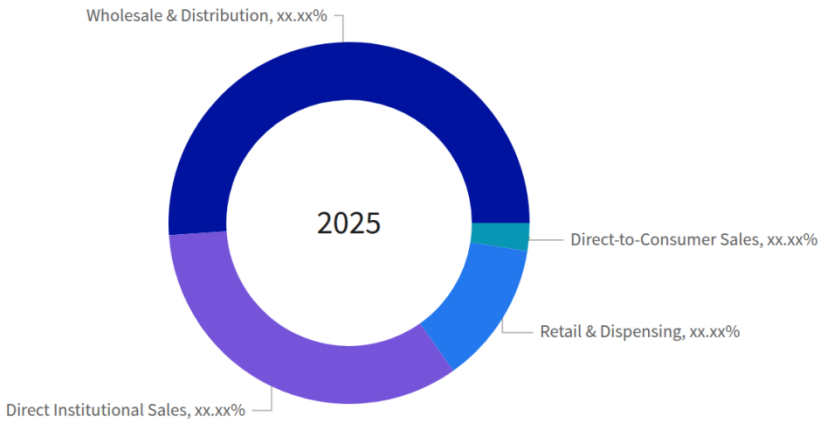


Figure 21. Global Post-Operative Wound Dressings Market, by Sales Channel, 2032 (USD Million)

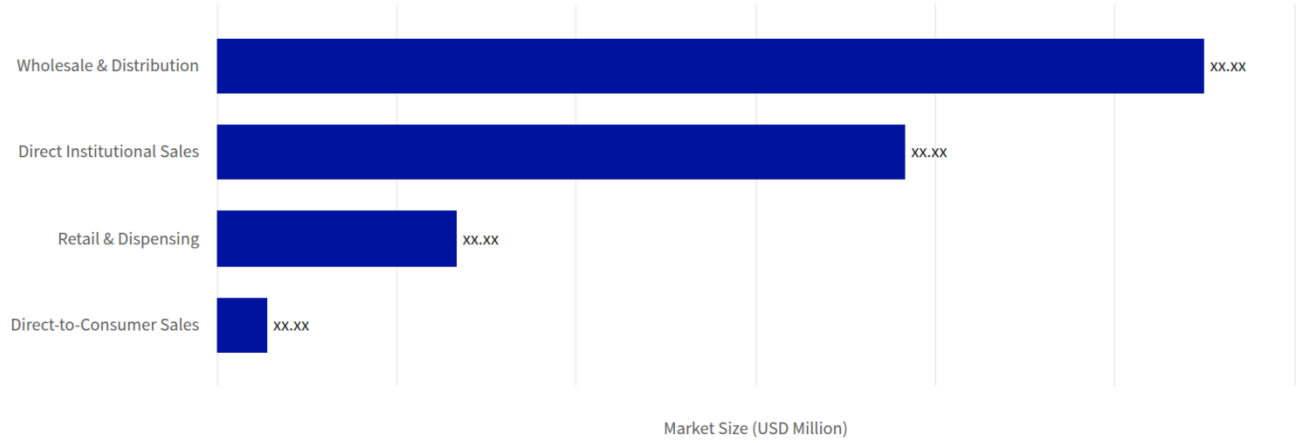


Table 196. Global Post-Operative Wound Dressings Market, by Sales Channel growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 197. Global Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Procurement Services

   · HealthShare NSW assigns onward catalog publication to the contracted distributor where that distributor supplies the customer; direct suppliers retain direct publication responsibility. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

2. Advanced Wound Care and Lymphoedema Products and Services Framework Agreement | SBS10142

   · Under the framework's total-purchase route, dressings belong to the organization rather than the patient, separating purchasing ownership from patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

   · Taxonomy evidence: Organizational ownership can differ from patient delivery destination. Framework award terminology alone does not determine whether the counted principal sells directly or through a reseller.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

3. Consumer - Medline
   - Medline's consumer-business page identifies wound-care offerings and names third-party retail and pharmacy outlets alongside its Medline at Home storefront link. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
4. Shop - PowerHeal Bandage
   - PowerHeal's branded shop provides consumer checkout while identifying surgical incisions within its prescription-use category; this does not establish unrestricted postoperative over-the-counter access. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))
5. Advanced Wound Care
   - Taxonomy evidence: The framework distinguishes supply routes from online ordering and offers commitment-dependent pricing. Neither ordering medium nor a pricing agreement alone identifies the first independent purchasing counterparty.
6. North American Industry Classification System - United States, 2022
   - Taxonomy evidence: The official classification distinguishes own-account merchants from agents that do not take title, and describes retailing as the final merchandise-distribution step. This supports transaction-role allocation rather than channel labels based on ordering technology.
7. Partnering with the NHS to Sell Goods and Services
   - Taxonomy evidence: Government commercial guidance distinguishes selling directly to healthcare providers from selling through supply-chain and collaborative purchasing arrangements.
8. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

9. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

10. Smith+Nephew Fourth Quarter and Full Year 2020 Results

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

11. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

12. Smith+Nephew Second Quarter and First Half 2026 Results

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

13. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

14. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

15. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration.
([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement.
([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

16. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share.
([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share.
([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

17. Medline Inc. - 2025 Form 10-K

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

18. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

13.1. Wholesale & Distribution

Table 198. Global Post-Operative Wound Dressings Market Size, by Wholesale & Distribution, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 199. Global Post-Operative Wound Dressings Market Size, by Wholesale & Distribution, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 200. Global Post-Operative Wound Dressings Market Size, by Wholesale & Distribution, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. North American Industry Classification System - United States, 2022
   · Taxonomy evidence: NAICS xx.xx expressly includes surgical-dressing merchant wholesalers. Group purchasing organizations buying and selling on their own account are distinguished from agency-only organizations.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. Medline Inc. - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
19. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
20. HealthShare NSW - Procurement Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

13.2. Direct Institutional Sales

Table 201. Global Post-Operative Wound Dressings Market Size, by Direct Institutional Sales, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 202. Global Post-Operative Wound Dressings Market Size, by Direct Institutional Sales, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 203. Global Post-Operative Wound Dressings Market Size, by Direct Institutional Sales, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

   · Taxonomy evidence: The wound-care framework supports organizational purchasing, supplier awards and online ordering. Under its total-purchase route, dressings belong to the purchasing organization rather than the patient.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment.
   ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment.
   ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

2. Partnering with the NHS to Sell Goods and Services

   · Taxonomy evidence: The guidance expressly describes direct supplier sales to trusts and primary-care organizations, while noting that providers may buy from either manufacturers or distributors. Its historical procurement rules are not adopted as current Global requirements.

3. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

4. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

5. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

7. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. Medline Inc. - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

19. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
20. HealthShare NSW - Procurement Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

13.3. Retail & Dispensing

Table 204. Global Post-Operative Wound Dressings Market Size, by Retail & Dispensing, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 205. Global Post-Operative Wound Dressings Market Size, by Retail & Dispensing, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 206. Global Post-Operative Wound Dressings Market Size, by Retail & Dispensing, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. North American Industry Classification System - United States, 2022

   · Taxonomy evidence: The classification separately recognizes pharmacies and health-product retailers, including convalescent-supply retailers. These establish retail intermediary roles, not Global postoperative-dressing shares.

2. Consumer - Medline

   · Taxonomy evidence: The company's consumer-business page identifies wound-care products among home offerings and lists third-party pharmacy, general-retail and online-retail outlets. This supports observed retail participation, not an exhaustive market partition.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
5. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
7. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
8. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

13.4. Direct-to-Consumer Sales

Table 207. Global Post-Operative Wound Dressings Market Size, by Direct-to-Consumer Sales, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 208. Global Post-Operative Wound Dressings Market Size, by Direct-to-Consumer Sales, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 209. Global Post-Operative Wound Dressings Market Size, by Direct-to-Consumer Sales, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Medline Inc. - Form S-1 Registration Statement
   - Taxonomy evidence: The registration statement explicitly identifies the company's direct-to-consumer channel. This establishes a disclosed commercial model, not its postoperative-specific revenue, market-wide prevalence or Global share.

2. Consumer - Medline
   - Taxonomy evidence: The same business page links its own consumer storefront alongside independent retail outlets, corroborating distinct own-storefront and reseller routes without establishing postoperative-specific sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
3. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
5. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
7. Smith+Nephew Second Quarter and First Half 2026 Results
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

8. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
20. PowerHeal Bandage - Shop
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

14. Post-Operative Wound Dressings Market, by Fixation Design

Fixation Design changes the offering being purchased independently of dressing material. Mepilex Border Post-Op provides a marketed bordered adhesive incision-dressing example. ■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■ ■■■■■■■■■ ■■■■■■■■

US Medicare coding adds a commercial consequence: its adhesive-border classification requires an integrated cover with a distinct surrounding border, and coding uses the dressing pad rather than the outside border dimensions. ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ That flexibility adds an inventory and responsibility check; neither format establishes clinical equivalence or a universal switching preference.

Figure 22. Global Post-Operative Wound Dressings Market Size, by Fixation Design, 2025 (%)

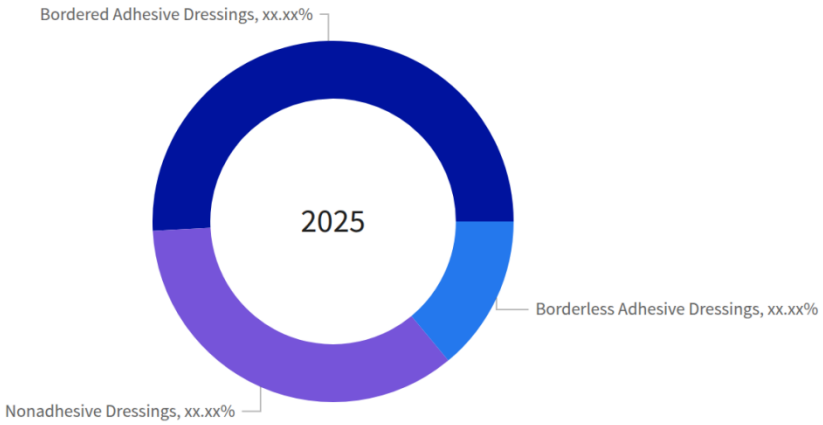


Figure 23. Global Post-Operative Wound Dressings Market, by Fixation Design, 2032 (USD Million)

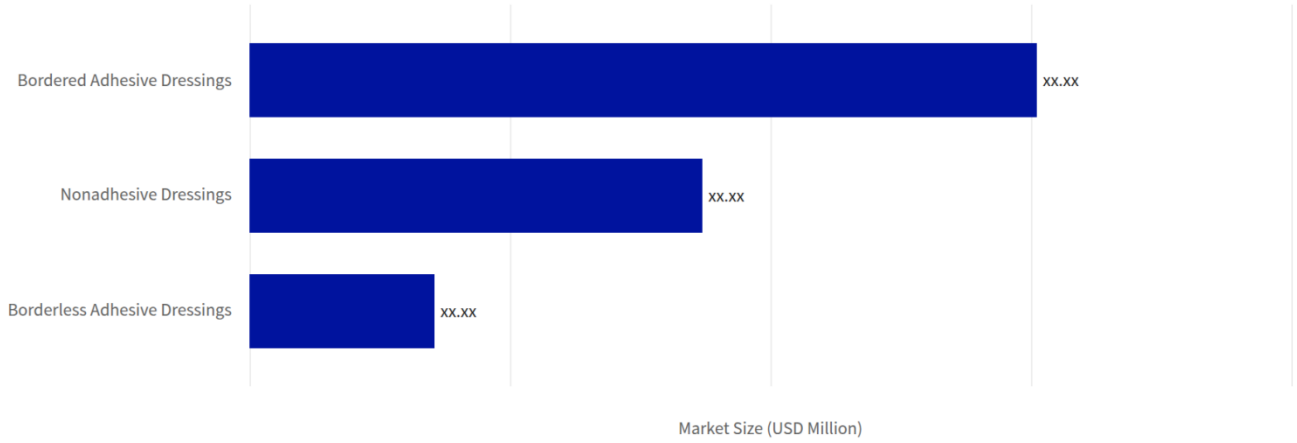


Table 210. Global Post-Operative Wound Dressings Market, by Fixation Design growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 211. Global Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   · Medicare coding distinguishes integrated adhesive-border covers and uses pad dimensions rather than outside border dimensions.
   ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
2. ALLEVYN Non-Bordered Foam Dressings | Smith+Nephew USA
   · Smith+Nephew's non-bordered range separately identifies adhesive ALLEVYN GENTLE and ALLEVYN Non-Adhesive offerings and includes surgical wounds among the range's stated applications.
   ([smith-nephew.com](https://www.smith-nephew.com/en-us/health-care-professionals/products/advanced-wound-management/allevyn-non-bordered-global))
3. Mepilex® Border Post-Op
   · Mölnlycke identifies Mepilex Border Post-Op as an incision-dressing offering with adhesive technology, providing a bordered commercial example.
   ([molnlycke.com](https://www.molnlycke.com/en-gb/products/wound-care/incision-dressings/mepilex-border-post-op?variantId=xx.xx))
4. Surgical Dressings - Policy Article (A54563)
   · Taxonomy evidence: Surgical-dressing coding distinguishes wound covers with and without an adhesive border, independently of their wound-management material.
5. Sandwell Area Formulary - Wound Management Products
   · Taxonomy evidence: The formulary distinguishes adhesive and nonadhesive foam offerings and separately describes bordered and nonbordered silicone-adhesive products.
6. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
7. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
8. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
9. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

10. Smith+Nephew Second Quarter and First Half 2026 Results

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

11. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

12. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

13. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

14. NHSBSA Drug Tariff April 2025 - Part IXA

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advapore and matched-pad CovaWound bordered prices constrain representative bordered value weights; tariff prices are purchasing proxies, not supplier revenue observations.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advapore and matched-pad CovaWound bordered prices constrain representative bordered value weights; tariff prices are purchasing proxies, not supplier revenue observations.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: OpSite Flexigrid and ALLEVYN GENTLE basic prices constrain borderless adhesive relative-price inputs retained in the forecast model.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OpSite Flexigrid and ALLEVYN GENTLE basic prices constrain borderless adhesive relative-price inputs retained in the forecast model.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Absopad, CovaWound nonadhesive foam and ALLEVYN Non-Adhesive basic prices supply the comparison prices for nonadhesive value weights.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Absopad, CovaWound nonadhesive foam and ALLEVYN Non-Adhesive basic prices supply the comparison prices for nonadhesive value weights.

15. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
16. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
17. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

18. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
19. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.

14.1. Bordered Adhesive Dressings

Table 212. Global Post-Operative Wound Dressings Market Size, by Bordered Adhesive Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 213. Global Post-Operative Wound Dressings Market Size, by Bordered Adhesive Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 214. Global Post-Operative Wound Dressings Market Size, by Bordered Adhesive Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDA K190268 - Hydrofera Blue READY-Border: 510(k) Summary

   · Taxonomy evidence: The documented silicone adhesive border supplies a postoperative regulatory example of integral bordered fixation, separate from the foam matrix and antibacterial agents. ([accessdata.fda.gov](https://www.accessdata.fda.gov/cdrh_docs/pdf19/K190268.pdf))

2. Surgical Dressings - Policy Article (A54563)
   · Taxonomy evidence: An adhesive-border wound cover has an integrated cover and distinct adhesive border around all sides. Coding uses pad dimensions rather than the outside border dimensions.
3. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
4. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
5. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
6. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
7. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
8. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
9. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

10. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

12. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
13. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
14. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

15. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
16. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
17. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
18. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
19. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advapore and matched-pad CovaWound bordered prices constrain representative bordered value weights; tariff prices are purchasing proxies, not supplier revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advapore and matched-pad CovaWound bordered prices constrain representative bordered value weights; tariff prices are purchasing proxies, not supplier revenue observations.
20. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
21. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.

22. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
23. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
24. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
25. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.

14.2. Nonadhesive Dressings

Table 215. Global Post-Operative Wound Dressings Market Size, by Nonadhesive Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 216. Global Post-Operative Wound Dressings Market Size, by Nonadhesive Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 217. Global Post-Operative Wound Dressings Market Size, by Nonadhesive Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Sandwell Area Formulary - Wound Management Products

   · Taxonomy evidence: The foam-dressing portfolio explicitly includes nonadhesive versions, supporting a separate no-integral-adhesive category rather than treating every borderless dressing as adhesive.

2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
6. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
7. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Absopad, CovaWound nonadhesive foam and ALLEVYN Non-Adhesive basic prices supply the comparison prices for nonadhesive value weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Absopad, CovaWound nonadhesive foam and ALLEVYN Non-Adhesive basic prices supply the comparison prices for nonadhesive value weights.
19. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
20. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

21. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
22. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.

14.3. Borderless Adhesive Dressings

Table 218. Global Post-Operative Wound Dressings Market Size, by Borderless Adhesive Dressings, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 219. Global Post-Operative Wound Dressings Market Size, by Borderless Adhesive Dressings, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 220. Global Post-Operative Wound Dressings Market Size, by Borderless Adhesive Dressings, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Sandwell Area Formulary - Wound Management Products
   · Taxonomy evidence: The postoperative-eligible silicone-adhesive foam range is explicitly available in border and nonborder versions, establishing that borderlessness does not imply absence of adhesive.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OpSite Flexigrid and ALLEVYN GENTLE basic prices constrain borderless adhesive relative-price inputs retained in the forecast model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OpSite Flexigrid and ALLEVYN GENTLE basic prices constrain borderless adhesive relative-price inputs retained in the forecast model.
19. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
20. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.

15. Post-Operative Wound Dressings Market, by Absorbency

Absorbency is a buyer-relevant classification, not a ladder of product superiority. NHS Supply Chain's Advanced Wound Care framework, scheduled from September 2025 through August 2027, publishes Low Absorbency, Moderate Absorbency, High Absorbency, and Ultra-High Absorbency bands using Total Fluid Handling Capacity. ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■

Nonabsorptive offerings have a different commercial role rather than simply occupying the bottom band. ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ A cross-system equivalence rule is not established by these procurement and coding examples; where declarations cannot be aligned, separate product comparisons are more defensible than forced reclassification.

Figure 24. Global Post-Operative Wound Dressings Market Size, by Absorbency, 2025 (%)

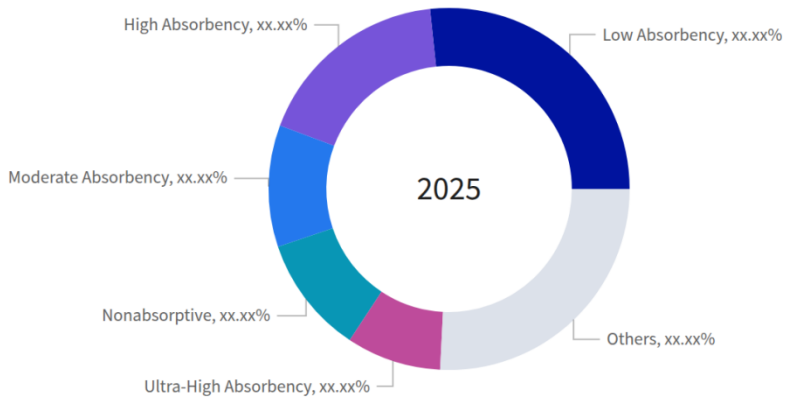


Figure 25. Global Post-Operative Wound Dressings Market, by Absorbency, 2032 (USD Million)

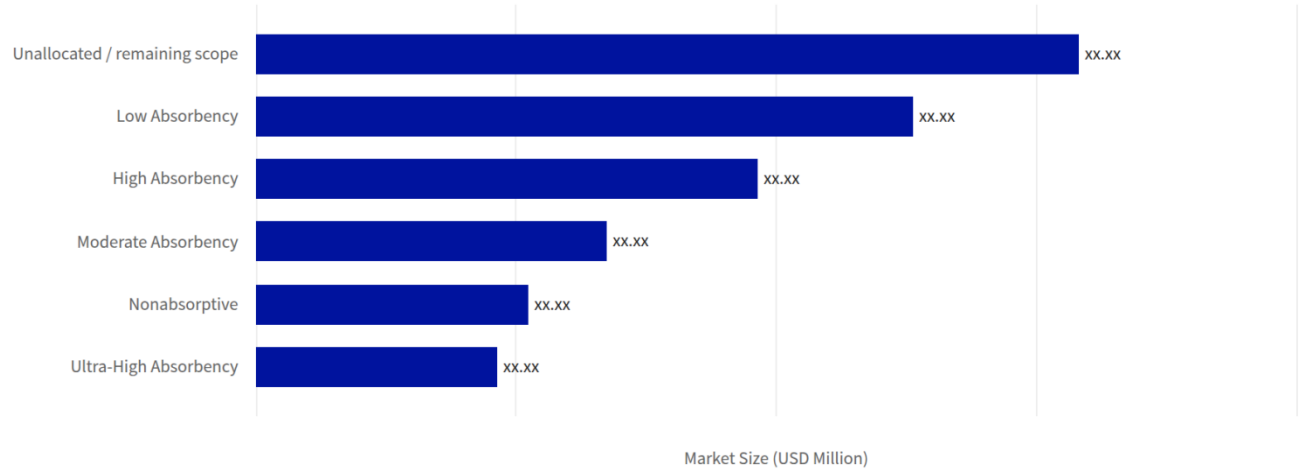


Table 221. Global Post-Operative Wound Dressings Market, by Absorbency growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 222. Global Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   - The policy identifies contact-layer dressings as nonabsorptive and distinguishes them from an absorptive cover. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
2. Advanced Wound Care
   - The framework runs from September xx.xx 2025 to August xx.xx 2027 and publishes Low, Moderate, High, and Ultra-High classifications using Total Fluid Handling Capacity. These establish a specific procurement language, not a universal crosswalk. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/))
3. Advanced Wound Care
   - Taxonomy evidence: The September 2025-August 2027 framework publishes four total-fluid-handling bands in product listings. These are procurement classifications, not evidence of universal international adoption.
4. Surgical Dressings - Policy Article (A54563)
   - Taxonomy evidence: The policy recognizes both nonabsorptive contact layers and absorptive dressing categories. It does not supply a universal cross-material absorbency-band system.
5. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
6. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
7. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
8. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
9. Smith+Nephew Second Quarter and First Half 2026 Results
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

10. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

11. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

12. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

13. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Jelonet's April 2025 basic price of xx.xx pence supplies a low-priced mesh comparator; its use as a contact-product price proxy is modeled, not a claimed coding equivalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Jelonet's April 2025 basic price of xx.xx pence supplies a low-priced mesh comparator; its use as a contact-product price proxy is modeled, not a claimed coding equivalence.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primapore's representative basic price of xx.xx pence supports the conventional-offering relative-price bridge; Low-band classification coverage remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primapore's representative basic price of xx.xx pence supports the conventional-offering relative-price bridge; Low-band classification coverage remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence ActivHeal Silicone Foam Border Lite comparator supports the moderate-archetype value weight, with relative realization held constant in the forecast.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence ActivHeal Silicone Foam Border Lite comparator supports the moderate-archetype value weight, with relative realization held constant in the forecast.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence FoamLite comparator supports the high-archetype value weight; the source does not report future prices or global net revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence FoamLite comparator supports the high-archetype value weight; the source does not report future prices or global net revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence FarlaFOAM S comparator supports the ultra-high-archetype value weight and challenges an automatic monotonic price premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence FarlaFOAM S comparator supports the ultra-high-archetype value weight and challenges an automatic monotonic price premium.
14. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm²; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm²; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm², constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm², constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm²; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm²; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm², without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm², without establishing an international sales distribution.

15. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
16. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

17. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

15.1. Low Absorbency

Table 223. Global Post-Operative Wound Dressings Market Size, by Low Absorbency, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 224. Global Post-Operative Wound Dressings Market Size, by Low Absorbency, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 225. Global Post-Operative Wound Dressings Market Size, by Low Absorbency, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Advanced Wound Care
   · Taxonomy evidence: The published Low band is xx.xx-xx.xx g/xx.xx cm².
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primapore's representative basic price of xx.xx pence supports the conventional-offering relative-price bridge; Low-band classification coverage remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primapore's representative basic price of xx.xx pence supports the conventional-offering relative-price bridge; Low-band classification coverage remains assumed.
19. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm²; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm²; this supplies a classification boundary, not a sales weight.

15.2. High Absorbency

Table 226. Global Post-Operative Wound Dressings Market Size, by High Absorbency, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 227. Global Post-Operative Wound Dressings Market Size, by High Absorbency, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 228. Global Post-Operative Wound Dressings Market Size, by High Absorbency, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Advanced Wound Care
   · Taxonomy evidence: The published High band is xx.xx-xx.xx g/xx.xx cm².
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence FoamLite comparator supports the high-archetype value weight; the source does not report future prices or global net revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence FoamLite comparator supports the high-archetype value weight; the source does not report future prices or global net revenue.
19. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
20. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
21. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
22. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.

15.3. Moderate Absorbency

Table 229. Global Post-Operative Wound Dressings Market Size, by Moderate Absorbency, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 230. Global Post-Operative Wound Dressings Market Size, by Moderate Absorbency, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 231. Global Post-Operative Wound Dressings Market Size, by Moderate Absorbency, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Advanced Wound Care
   · Taxonomy evidence: The published Moderate band is xx.xx-xx.xx g/xx.xx cm².
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

7. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.

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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
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13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence ActivHeal Silicone Foam Border Lite comparator supports the moderate-archetype value weight, with relative realization held constant in the forecast.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence ActivHeal Silicone Foam Border Lite comparator supports the moderate-archetype value weight, with relative realization held constant in the forecast.
19. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
20. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
21. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
22. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.

15.4. Nonabsorptive

Table 232. Global Post-Operative Wound Dressings Market Size, by Nonabsorptive, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 233. Global Post-Operative Wound Dressings Market Size, by Nonabsorptive, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 234. Global Post-Operative Wound Dressings Market Size, by Nonabsorptive, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   · Taxonomy evidence: The surgical-dressing policy explicitly identifies contact-layer dressings as nonabsorptive, distinguishing them from a separate absorptive cover.
2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
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4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

6. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

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   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Jelonet's April 2025 basic price of xx.xx pence supplies a low-priced mesh comparator; its use as a contact-product price proxy is modeled, not a claimed coding equivalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Jelonet's April 2025 basic price of xx.xx pence supplies a low-priced mesh comparator; its use as a contact-product price proxy is modeled, not a claimed coding equivalence.
19. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
20. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.

15.5. Ultra-High Absorbency

Table 235. Global Post-Operative Wound Dressings Market Size, by Ultra-High Absorbency, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 236. Global Post-Operative Wound Dressings Market Size, by Ultra-High Absorbency, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 237. Global Post-Operative Wound Dressings Market Size, by Ultra-High Absorbency, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Advanced Wound Care
   - Taxonomy evidence: The published Ultra-High band begins at xx.xx g/xx.xx cm².

2. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
   ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
3. Solventum Corporation - 2025 Form 10-K
   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
   ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
4. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
5. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census.
   ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))
6. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth.
   ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
7. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary.
   ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
8. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

9. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.

11. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
12. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
18. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence FarlaFOAM S comparator supports the ultra-high-archetype value weight and challenges an automatic monotonic price premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-pence FarlaFOAM S comparator supports the ultra-high-archetype value weight and challenges an automatic monotonic price premium.
19. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
20. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
21. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

22. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

16. Post-Operative Wound Dressings Market, by Region

Asia-Pacific requires separate treatment of regulatory distribution and institutional ordering. Singapore requires licenses for medical-device manufacturers, importers, and wholesalers, while HealthShare NSW assigns catalog-publication responsibility according to the direct or distributor supply relationship. [redacted]

[redacted] Suppliers should not transfer a facility purchasing proposition unchanged into home replenishment or across the border. The relevant commitment is an accepted product, supplying party, and payment arrangement-not a North American portfolio listing alone.

In Latin America, Brazil provides a concrete reason to examine control of the local commercial relationship. Anvisa states that foreign companies need legally constituted Brazilian partners responsible for imported and distributed products rather than obtaining authorizations directly. [redacted]

[redacted] Buyers gain purchasing control, while specialist offerings require an accepted exception or inclusion route. This is a documented European example, not a uniform rule for all European purchasers.

For Middle East entry, Saudi Arabia illustrates why regulatory representation is a separate commercial control point. SFDA's published requirements distinguish marketing authorization and the licensed authorized representative acting for an overseas manufacturer. [redacted]

In Africa, South Africa separates establishment licensing from state purchasing. ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ The bid documents demonstrate a route and its conditions, not an individual award, and South African qualification should not be treated as an Africa-wide authorization.

Figure 26. Global Post-Operative Wound Dressings Market, by Region: Market share evolution, 2025-2032

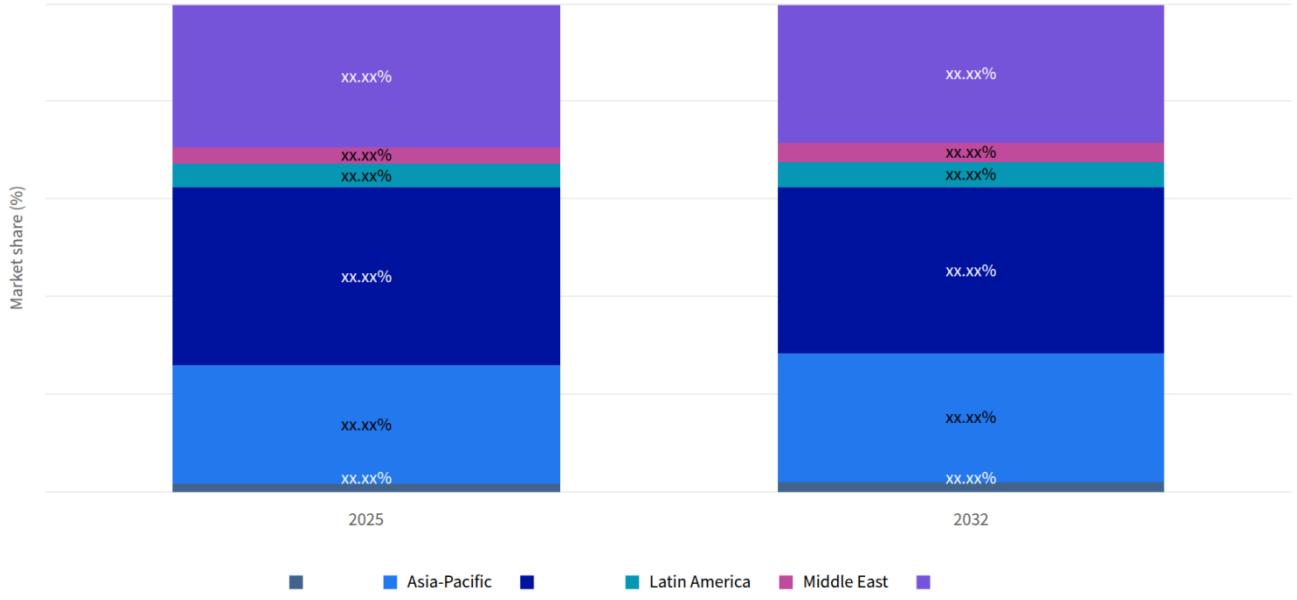


Figure 27. Global Post-Operative Wound Dressings Market, by Region: Market size by category, 2025

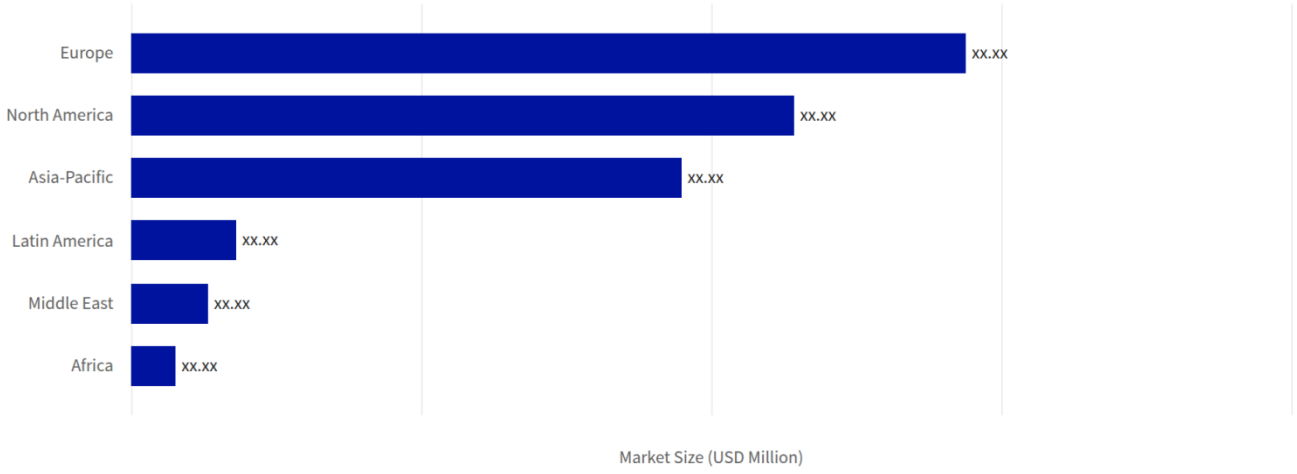


Figure 28. Global Post-Operative Wound Dressings Market, Regional growth by Fixation Design, 2025-2032 (CAGR %)

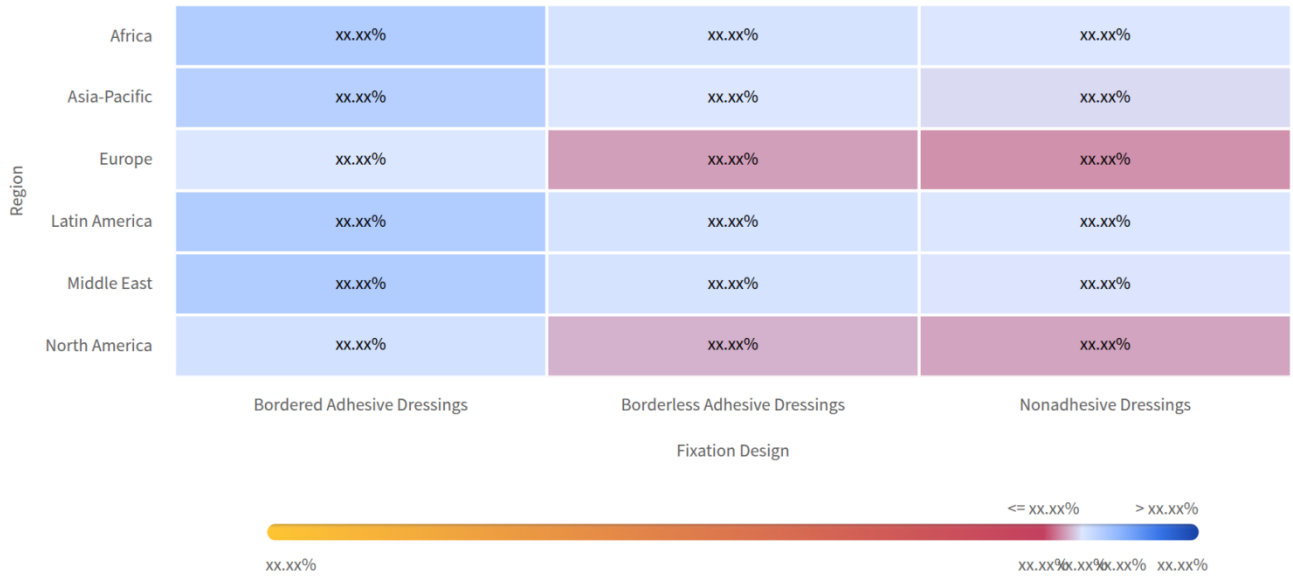


Table 238. Global Post-Operative Wound Dressings Market, by Region growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 239. Global Post-Operative Wound Dressings Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Surgical Dressings - Policy Article (A54563)
   · Dressings furnished within a billed professional service are included in that service's payment rather than separately payable.
   ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/article.aspx?articleid=xx.xx))
2. Procurement Services
   · The NSW example establishes a purchasing-information responsibility distinct from a supplier's regional distribution footprint.
   ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
3. Advanced Wound Care and Lymphoedema Products and Services Framework Agreement | SBS10142
   · The framework describes formulary-controlled online ordering and Tissue Viability team involvement for products outside the system.
   ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
4. Regulatory requirements for importing medical devices
   · Health Canada distinguishes device licensing and importer establishment licensing according to class and exemptions, establishing separate product and supplying-party questions.
   ([canada.ca](https://www.canada.ca/en/health-canada/services/drugs-health-products/compliance-enforcement/importation-exportation/regulatory-importing-medical-devices.html))
5. Medical devices
   · Anvisa states that foreign companies cannot obtain marketing authorizations directly and must have legally constituted Brazilian partners responsible for imported and distributed products.
   ([gov.br](https://www.gov.br/anvisa/en/regulation-of-products/medical-devices))
6. Requirements for Medical Devices Marketing Authorization (MDS-REQ 1)
   · SFDA's requirements distinguish medical-device marketing authorization and licensed authorized representation for overseas manufacturers. ([sfda.gov.sa](https://www.sfda.gov.sa/sites/default/files/2021-xx.xx/REQ1En_0.pdf))
7. Medical Devices
   · SAHPRA distinguishes manufacturer, distributor, and wholesaler establishment licenses with different activity scopes. ([sahpra.org.za](https://www.sahpra.org.za/medical-devices/?utm_source=openai))
8. Importer, wholesaler and manufacturers' licensing
   · Singapore requires dealer licenses for medical-device manufacturing, importing, and wholesaling.
   ([hsa.gov.sg](https://www.hsa.gov.sg/medical-devices/manufacturing-import-and-supply/dealers-licence/))
9. RT42-2025: Special Conditions of the Contract
   · The RT42-2025 special conditions concern state procurement of bandages and dressings and distinguish bid evaluation and appointment from general establishment licensing.
   ([etenders.gov.za](https://www.etenders.gov.za/home/Download/?blobName=484281e2-e139-4d40-xx.xx-15e1e346262b.pdf&downloadedFileName=xx.xx.+RT42-2025+Special+Conditions+of+Contract.pdf))
10. Size and distribution of the global volume of surgery in 2012.
    · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value.
    ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
11. Solventum Corporation - 2025 Form 10-K
    · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint.
    ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

12. Smith+Nephew Fourth Quarter and Full Year 2020 Results

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

13. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

14. Smith+Nephew Second Quarter and First Half 2026 Results

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

15. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

16. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

17. NHS Supply Chain - Negative Pressure Wound Therapy

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.

18. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
19. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.

20. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.

16.1. Europe

Table 240. Europe Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 241. Europe Post-Operative Wound Dressings Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 242. Europe Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 243. Europe Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 244. Europe Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 245. Europe Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 246. Europe Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 247. Europe Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 248. Europe Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 249. Europe Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 250. Europe Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
2. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
3. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Procurement separation constrains the European allocation boundary and avoids counting equipment revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.

9. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support European scores, subject to domestic-supply and intra-European-flow adjustments.
10. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support European country and background inputs.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations identify material outward flows requiring European hub adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dutch outward trade independently supports discounting gross imports; it does not measure the exact discount.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dutch outward trade independently supports discounting gross imports; it does not measure the exact discount.
12. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Dutch hub-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Dutch hub-flow challenge.
13. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
14. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.

15. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

16. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

17. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
18. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

19. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

20. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

21. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
22. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
23. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
24. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
25. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
26. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

27. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
28. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
29. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
30. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
31. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

32. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
33. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
34. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
35. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

36. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
37. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
38. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

39. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
40. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

41. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
42. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
43. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
44. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
45. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
46. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
47. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

48. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
49. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
50. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
51. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

52. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

53. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

54. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
55. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

56. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

57. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

58. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
59. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
60. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
61. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

62. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

63. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
64. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
65. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
66. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

67. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

68. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

69. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

70. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

71. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

72. Medline - Consumer
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
73. PowerHeal Bandage - Shop
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))
74. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
75. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.

76. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
77. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
78. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.

79. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
80. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

16.2. North America

Table 251. North America Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 252. North America Post-Operative Wound Dressings Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 253. North America Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 254. North America Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 255. North America Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 256. North America Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 257. North America Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 258. North America Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 259. North America Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 260. North America Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 261. North America Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
2. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
3. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2023 adhesive-dressing import inputs support the regional purchasing-score model; not postoperative sales.
10. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code medical-dressing imports support the North American score denominator.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations challenge treating manufacturing and gross inward trade as domestic demand.
12. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.

13. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

14. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
15. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

16. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

17. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

18. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
19. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
20. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
21. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
22. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
23. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

24. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
25. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
26. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
27. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
28. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

29. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
30. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
31. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
32. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

33. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
34. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
35. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

36. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
37. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

38. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
39. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
40. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
41. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
42. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
43. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
44. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

45. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
46. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
47. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
48. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

49. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
50. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

51. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
52. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

53. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

54. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

55. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
56. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
57. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
58. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

59. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

60. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
61. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
62. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
63. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

64. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

65. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

66. Medline Inc. - 2025 Form 10-K

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

67. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

68. HealthShare NSW - Procurement Services

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

69. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

70. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

71. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

72. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
73. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
74. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

75. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
76. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
77. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

78. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

16.3. Asia-Pacific

Table 262. Asia-Pacific Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 263. Asia-Pacific Post-Operative Wound Dressings Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 264. Asia-Pacific Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 265. Asia-Pacific Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 266. Asia-Pacific Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 267. Asia-Pacific Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 268. Asia-Pacific Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 269. Asia-Pacific Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 270. Asia-Pacific Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 271. Asia-Pacific Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 272. Asia-Pacific Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
2. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
3. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Asia-Pacific scores, with explicit domestic and re-export bridges.
10. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Asia-Pacific country and background inputs.
11. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Export observations constrain interpretation of Asian manufacturing and distribution footprints.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Singapore's outward trade supports a retained-destination adjustment rather than a footprint-based share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Singapore's outward trade supports a retained-destination adjustment rather than a footprint-based share.
12. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Singapore hub-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Singapore hub-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

13. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

14. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
15. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

16. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

17. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

18. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
19. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
20. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
21. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
22. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
23. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

24. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
25. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
26. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
27. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
28. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

29. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
30. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
31. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
32. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

33. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
34. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
35. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

36. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
37. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

38. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
39. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
40. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
41. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
42. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
43. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
44. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

45. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
46. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
47. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
48. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

49. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
50. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

51. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
52. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

53. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

54. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

55. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
56. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
57. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
58. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

59. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

60. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
61. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
62. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
63. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

64. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

65. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

66. Medline Inc. - 2025 Form 10-K

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

67. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

68. HealthShare NSW - Procurement Services

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

69. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

70. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

71. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

72. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
73. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
74. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

75. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
76. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
77. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

78. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

16.4. Latin America

Table 273. Latin America Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 274. Latin America Post-Operative Wound Dressings Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 275. Latin America Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 276. Latin America Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 277. Latin America Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 278. Latin America Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 279. Latin America Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 280. Latin America Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 281. Latin America Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 282. Latin America Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 283. Latin America Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Latin American relative purchasing scores and background coverage.
10. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Latin American country and background inputs.
11. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

12. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

13. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
14. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

15. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

16. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

17. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
18. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
19. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
20. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
21. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
22. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

23. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
24. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
25. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
26. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
27. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

28. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
29. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
30. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
31. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

32. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
33. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
34. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

35. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
36. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

37. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
38. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
39. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
40. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
41. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
42. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
43. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

44. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
45. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
46. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
47. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

48. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
49. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

50. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
51. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

52. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

53. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

54. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
55. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
56. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
57. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

58. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

59. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
60. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
61. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
62. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

63. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

64. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

65. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

66. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

67. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

68. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

69. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

70. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

71. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
72. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
73. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

74. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
75. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
76. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

77. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

16.5. Middle East

Table 284. Middle East Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 285. Middle East Post-Operative Wound Dressings Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 286. Middle East Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 287. Middle East Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 288. Middle East Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 289. Middle East Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 290. Middle East Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 291. Middle East Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 292. Middle East Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 293. Middle East Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 294. Middle East Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support Middle Eastern scores; imports are not local end-use totals.
10. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support Middle Eastern country and background inputs.

11. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

12. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
13. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

14. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

15. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

16. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
17. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
18. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
19. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
20. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
21. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

22. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
23. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
24. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
25. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
26. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

27. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
28. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
29. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
30. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

31. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
32. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
33. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

34. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
35. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

36. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.

37. Essity acquires advanced wound care company in US - December 29, 2021
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.

38. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.

39. MaxioCel - What is MaxioCel?
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.

40. Schülke - Wound compendium
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.

41. MedCu - Advanced Copper-Based Wound Dressings
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.

42. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

43. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
44. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
45. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
46. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

47. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
48. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

49. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
50. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

51. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

52. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

53. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
54. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
55. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
56. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

57. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

58. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
59. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
60. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
61. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

62. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

63. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

64. Medline Inc. - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
65. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
66. HealthShare NSW - Procurement Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

67. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
68. Medline - Consumer
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
69. PowerHeal Bandage - Shop
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

70. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
71. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
72. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

73. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
74. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
75. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

76. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

16.6. Africa

Table 295. Africa Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 296. Africa Post-Operative Wound Dressings Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 297. Africa Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 298. Africa Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 299. Africa Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 300. Africa Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 301. Africa Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 302. Africa Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 303. Africa Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 304. Africa Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 305. Africa Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Adhesive dressings, for medical purposes: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country import inputs support African scores and noncatalog background estimation.
10. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed companion-code imports support African country and background inputs.

11. NHSBSA Drug Tariff April 2025 - Part IXA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

12. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
13. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

14. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

15. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

16. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
17. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
18. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
19. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
20. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
21. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

22. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
23. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
24. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
25. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
26. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

27. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
28. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
29. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
30. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

31. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
32. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
33. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

34. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
35. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

36. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
37. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
38. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
39. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
40. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
41. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
42. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

43. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
44. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
45. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
46. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

47. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

48. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

49. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
50. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

51. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

52. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

53. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
54. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
55. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
56. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

57. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

58. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
59. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
60. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
61. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

62. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

63. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

64. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

65. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

66. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

67. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

68. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

69. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

70. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
71. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
72. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

73. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
74. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
75. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

76. Information for Clinical Choice - Gelling Fibre Dressings Support Document

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

17. Post-Operative Wound Dressings Market, by Group

Americas offers a documented opportunity to coordinate quality-system oversight without combining national market access. MDSAP includes the United States, Canada, and Brazil as members and allows an accepted audit to address participating authorities' requirements. ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■ ■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■

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ASEAN provides a shared dossier framework while preserving national access decisions. ■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ Harmonized submission language should reduce duplication where accepted, not be treated as a regional sales passport.

GCC has an institutional pooling mechanism through the Gulf Health Council's joint procurement program, which describes qualified sources, coordinated tenders, delivery, and after-sales service. This can consolidate a supplier's bidding effort when a solicitation includes the relevant dressing and destinations. ■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■ ■■■■■ ■■■■■■■■■■■■

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Nordic cooperation is visible in published common criteria for more sustainable healthcare packaging. The historical criteria library provides a shared procurement vocabulary, while its adoption into a particular tender determines the binding requirement. ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪

▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ The framework does not establish that a particular dressing is selected for joint assessment. Suppliers targeting Germany, France, or other constituents should separate common regulatory documentation from the country-specific funding and purchasing proposition; shared compliance alone does not secure formulary acceptance.

BRICS comparisons should focus on the accountable business party rather than assume a common entry route. ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ A single group-wide appointment is unsuitable unless those country-specific responsibilities are demonstrably covered; these examples do not settle requirements throughout BRICS.

G7 membership is less informative for audit planning than the actual cooperation mechanism. ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ Cooperation provides a counterforce to duplication, but does not justify synchronizing every product launch or treating observer status as equivalent participation.

▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ This establishes a conditional institutional route, not postoperative dressing demand or an award. Suppliers should confirm a relevant solicitation and bidder eligibility before dedicating inventory or sales resources; ordinary civilian purchasing remains a separate route.

▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Their commercial value lies in identifying which documentation, procurement relationship, or legal responsibility can be shared-and which must remain destination-specific.

Figure 29. Global Post-Operative Wound Dressings Market Size, by Group, 2025 vs 2026 vs 2032

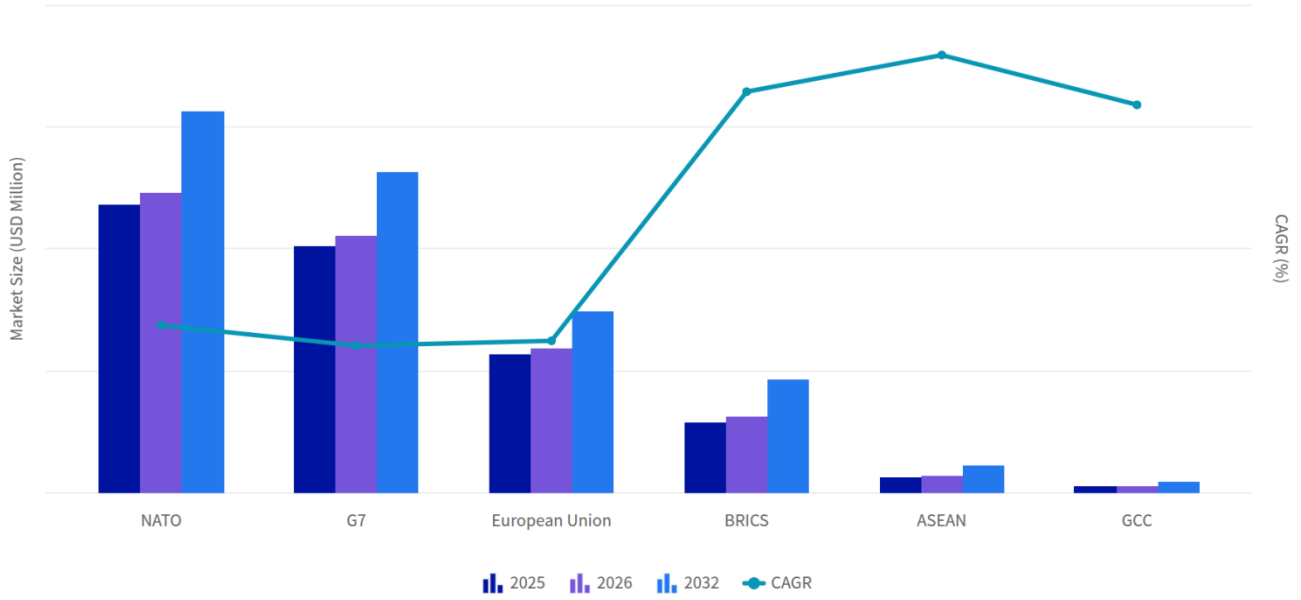


Table 306. Global Post-Operative Wound Dressings Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. Convatec Australia Pty Ltd - AQUACEL Ag Surgical Cover Dressing - Dressing, hydrophilic gel-forming (216814)

   · ARTG entry xx.xx identifies AQUACEL Ag Surgical Cover Dressing, Convatec Australia Pty Ltd as sponsor, and Convatec Limited as manufacturer. ([tga.gov.au](https://www.tga.gov.au/resources/artg/xx.xx))

2. MDCG 2021-24 Rev.1 - Guidance on classification of medical devices

   · The European classification guidance organizes medical-device classification around intended purpose and applicable rules, supporting common documentation rather than a material-label shortcut. ([health.ec.europa.eu](https://health.ec.europa.eu/system/files/2021-xx.xx/mdcg_2021-24_en_0.pdf))

3. Medical devices

   · The Brazilian domestic-partner requirement supports a constituent-specific accountability comparison within BRICS, not a common bloc access route. ([gov.br](https://www.gov.br/anvisa/en/regulation-of-products/medical-devices))

4. Requirements for Medical Devices Marketing Authorization (MDS-REQ 1)

   · The Saudi requirements establish local obligations relevant to EMEA arrangements and GCC procurement participation; a regional distribution label does not satisfy those obligations by itself. ([sfda.gov.sa](https://www.sfda.gov.sa/sites/default/files/2021-xx.xx/REQ1En_0.pdf))

5. Medical Devices

   · The establishment roles provide a South African constituent distinction for EMEA and BRICS commercial-accountability comparisons. ([sahpra.org.za](https://www.sahpra.org.za/medical-devices/))

6. Importer, wholesaler and manufacturers' licensing

   · Singapore's activity-specific licensing provides an implementation example within ASEAN rather than evidence of a regional license. ([hsa.gov.sg](https://www.hsa.gov.sg/medical-devices/manufacturing-import-and-supply/dealers-licence/))

7. Medical Device Single Audit Program (MDSAP)

   · MDSAP provides a shared regulatory-audit mechanism. The United States, Canada, Brazil, and Japan are members; the European Union and United Kingdom are official observers. These distinctions support the Americas and G7 cooperation analysis. ([fda.gov](https://www.fda.gov/medical-devices/cdrh-international-affairs/medical-device-single-audit-program-mdsap))

8. ASEAN Medical Device Directive

   · The ASEAN Medical Device Directive includes the Common Submission Dossier Template while preserving member-state registration and licensing responsibilities. ([asean.org](https://www.asean.org/wp-content/uploads/2021/xx.xx/xx.xx.-September-2015-ASEAN-Medical-Device-Directive.pdf))

9. Joint clinical assessments of medical devices and in vitro diagnostic medical devices

   · The Commission states that joint assessment supports national HTA while member states retain decisions concerning use and reimbursement. The selected-device framework does not establish assessment eligibility for every dressing. ([health.ec.europa.eu](https://health.ec.europa.eu/health-technology-assessment/implementation-regulation-health-technology-assessment/joint-clinical-assessments-medical-devices-and-vitro-diagnostic-medical-devices_en))

10. Consolidated purchasing

    · The Gulf Health Council describes coordinated medical-supply procurement, qualified sources, delivery, and after-sales service. This establishes a pooling mechanism, not a postoperative dressing award. ([ghc.sa](https://www.ghc.sa/en/procurement/))

11. Explanation of the WAND Database

    · Medsafe states that WAND is a notification system and does not mean a device has been assessed or approved by Medsafe. ([medsafe.govt.nz](https://www.medsafe.govt.nz/regulatory/DevicesNew/xx.xx-2Explanation.asp))

12. Nordic Criteria for More Sustainable Packaging for Healthcare Products - November 2021 Final Version

    · The November 2021 Nordic packaging-criteria publication provides a common healthcare procurement library. Its historical publication does not establish the requirements adopted in a particular operative dressing tender. ([sykehusinnkjop.no](https://www.sykehusinnkjop.no/49612c/siteassets/dokumenter/om-oss/samfunnsansvar/final-version-of-nordic-criteria-for-more-sustainable-packaging-ver-xx.xx.pdf))

13. Procurement Opportunities

    · NATO states that bidder eligibility is specified in individual procurement calls and that opportunities are generally reserved for firms registered in member nations, with possible exceptions. The page does not establish a postoperative dressing purchase. ([nato.int](https://www.nato.int/en/work-with-us/business-and-project-opportunities/procurement-opportunities))

14. Regulating medical devices in the UK

    · MHRA guidance requires Great Britain registration and a UK responsible person for overseas manufacturers, supporting the distinction between local accountability roles. ([gov.uk](https://www.gov.uk/guidance/regulating-medical-devices-in-the-uk))

15. Size and distribution of the global volume of surgery in 2012.

    · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

16. Solventum Corporation - 2025 Form 10-K

    · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

17. Smith+Nephew Fourth Quarter and Full Year 2020 Results

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

18. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

    · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

19. Smith+Nephew Second Quarter and First Half 2026 Results

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

20. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

21. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

22. NHS Supply Chain - Negative Pressure Wound Therapy

· Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

· Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))

17.1. NATO

Table 307. NATO Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 307 - continued

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 308. NATO Post-Operative Wound Dressings Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 308 - continued

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 309. NATO Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 310. NATO Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 311. NATO Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 312. NATO Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 313. NATO Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 314. NATO Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 315. NATO Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 316. NATO Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 317. NATO Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
2. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
3. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its

9. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dutch outward trade independently supports discounting gross imports; it does not measure the exact discount.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dutch outward trade independently supports discounting gross imports; it does not measure the exact discount.
10. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Dutch hub-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Dutch hub-flow challenge.
11. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

12. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

13. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
14. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

15. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

16. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

17. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
18. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
19. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
20. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
21. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
22. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

23. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
24. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
25. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
26. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
27. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

28. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
29. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
30. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
31. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

32. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
33. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
34. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

35. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
36. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

37. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
38. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
39. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
40. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
41. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
42. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
43. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

44. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
45. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
46. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
47. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

48. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

49. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

50. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
51. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

52. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

53. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

54. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
55. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
56. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
57. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

58. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

59. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
60. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
61. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
62. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

63. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

64. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

65. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

66. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

67. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

68. Medline - Consumer
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
69. PowerHeal Bandage - Shop
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))
70. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
71. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.

72. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
73. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
74. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.

75. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
76. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

17.2. G7

Table 318. G7 Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 319. G7 Post-Operative Wound Dressings Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 320. G7 Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 321. G7 Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 322. G7 Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 323. G7 Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 324. G7 Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 325. G7 Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 326. G7 Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 327. G7 Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 328. G7 Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
2. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
3. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its

9. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

10. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

11. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
12. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

13. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

14. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

15. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
16. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
17. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
18. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
19. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
20. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

21. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
22. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
23. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
24. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
25. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

26. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
27. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
28. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
29. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

30. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
31. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
32. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

33. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
34. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

35. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
36. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
37. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
38. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
39. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
40. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
41. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

42. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
43. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
44. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
45. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

46. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
47. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

48. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
49. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

50. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

51. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

52. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
53. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
54. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
55. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

56. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

57. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
58. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
59. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
60. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

61. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

62. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

63. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

64. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

65. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

66. Medline - Consumer
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
67. PowerHeal Bandage - Shop
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))
68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.

70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.

73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

17.3. European Union

Table 329. European Union Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 330. European Union Post-Operative Wound Dressings Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 331. European Union Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 332. European Union Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 333. European Union Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 334. European Union Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 335. European Union Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 336. European Union Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 337. European Union Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 338. European Union Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 339. European Union Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
2. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
3. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dutch outward trade independently supports discounting gross imports; it does not measure the exact discount.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dutch outward trade independently supports discounting gross imports; it does not measure the exact discount.
10. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Dutch hub-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Dutch hub-flow challenge.

11. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

12. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
13. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

14. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

15. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

16. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
17. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
18. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
19. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
20. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
21. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

22. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
23. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
24. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
25. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
26. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

27. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
28. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
29. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
30. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

31. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
32. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
33. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

34. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
35. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

36. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
37. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
38. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
39. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
40. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
41. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
42. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

43. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
44. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
45. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
46. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

47. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

48. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

49. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
50. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

51. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

52. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

53. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
54. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
55. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
56. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

57. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

58. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
59. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
60. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
61. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

62. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

63. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

64. Medline Inc. - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
65. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
66. HealthShare NSW - Procurement Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

67. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

68. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

69. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

70. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
71. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
72. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

73. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
74. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
75. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

76. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

17.4. BRICS

Table 340. BRICS Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 341. BRICS Post-Operative Wound Dressings Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 342. BRICS Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 343. BRICS Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 344. BRICS Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 345. BRICS Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 346. BRICS Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 347. BRICS Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 348. BRICS Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 349. BRICS Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 350. BRICS Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
10. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
11. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
12. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

13. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

14. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
15. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

16. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

17. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

18. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
19. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
20. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
21. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
22. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
23. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

24. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
25. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
26. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
27. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
28. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

29. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
30. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
31. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
32. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

33. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
34. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
35. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

36. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
37. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

38. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
39. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
40. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
41. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
42. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
43. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
44. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

45. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
46. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
47. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
48. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

49. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
50. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

51. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
52. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

53. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

54. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

55. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
56. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
57. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
58. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

59. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

60. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
61. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
62. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
63. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

64. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

65. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

66. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

67. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

68. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

69. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

70. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

71. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

72. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
73. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
74. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

75. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
76. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
77. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

78. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

17.5. ASEAN

Table 351. ASEAN Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 352. ASEAN Post-Operative Wound Dressings Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 353. ASEAN Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 354. ASEAN Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 355. ASEAN Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 356. ASEAN Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 357. ASEAN Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 358. ASEAN Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 359. ASEAN Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 360. ASEAN Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 361. ASEAN Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Wadding, gauze and related medical articles: imports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brunei's xx.xx input anchors the explicitly modeled missing-companion-code estimate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brunei's xx.xx input anchors the explicitly modeled missing-companion-code estimate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Laos's xx.xx input anchors the explicitly modeled missing-companion-code estimate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Laos's xx.xx input anchors the explicitly modeled missing-companion-code estimate.
10. WITS/UN Comtrade - Adhesive dressings, for medical purposes: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Singapore's outward trade supports a retained-destination adjustment rather than a footprint-based share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Singapore's outward trade supports a retained-destination adjustment rather than a footprint-based share.
11. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Singapore hub-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Singapore hub-flow challenge.

12. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

13. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
14. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

15. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

16. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

17. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
18. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
19. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
20. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
21. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
22. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

23. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
24. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
25. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
26. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
27. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

28. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
29. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
30. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
31. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

32. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
33. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
34. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

35. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
36. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

37. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
38. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
39. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
40. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
41. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
42. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
43. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

44. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
45. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
46. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
47. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

48. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

49. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

50. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
51. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

52. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

53. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

54. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
55. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
56. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
57. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

58. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

59. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
60. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
61. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
62. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

63. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

64. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

65. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

66. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage.
([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

67. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed.
([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed.
([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence.
([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence.
([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

68. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
69. Medline - Consumer
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
70. PowerHeal Bandage - Shop
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

71. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
72. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
73. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

74. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
75. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
76. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

77. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

17.6. GCC

Table 362. GCC Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 363. GCC Post-Operative Wound Dressings Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 364. GCC Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 365. GCC Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 366. GCC Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 367. GCC Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 368. GCC Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 369. GCC Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 370. GCC Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 371. GCC Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 372. GCC Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18. Post-Operative Wound Dressings Market, by Country

[illegible] A supplier should therefore establish an applicable funded arrangement before committing to a reimbursed postoperative Topical Oxygen Therapy proposition. The determination does not exclude the accepted category or establish a universal US rule; another payer's decision requires separate confirmation.

[illegible] Registration and an overseas manufacturer's UK responsible person remain separate requirements. Suppliers should match the actual device and certificate to the applicable route before promising continuity; a general CE-marked portfolio statement is insufficient.

Australia distinguishes consumer communication from unrestricted consumer selection. The TGA's June xx.xx 2023 permission for specified Mepilex Border Post Op representations requires accompanying healthcare-professional-supervision messaging. [illegible]

[illegible] A narrower supported assortment may be preferable to a broader catalog containing uncertain lines. This is a documented bid condition, not evidence of an individual award or a requirement governing every South African purchase.

Figure 30. Global Post-Operative Wound Dressings Market Size, by Country, 2025 vs 2032 (%)

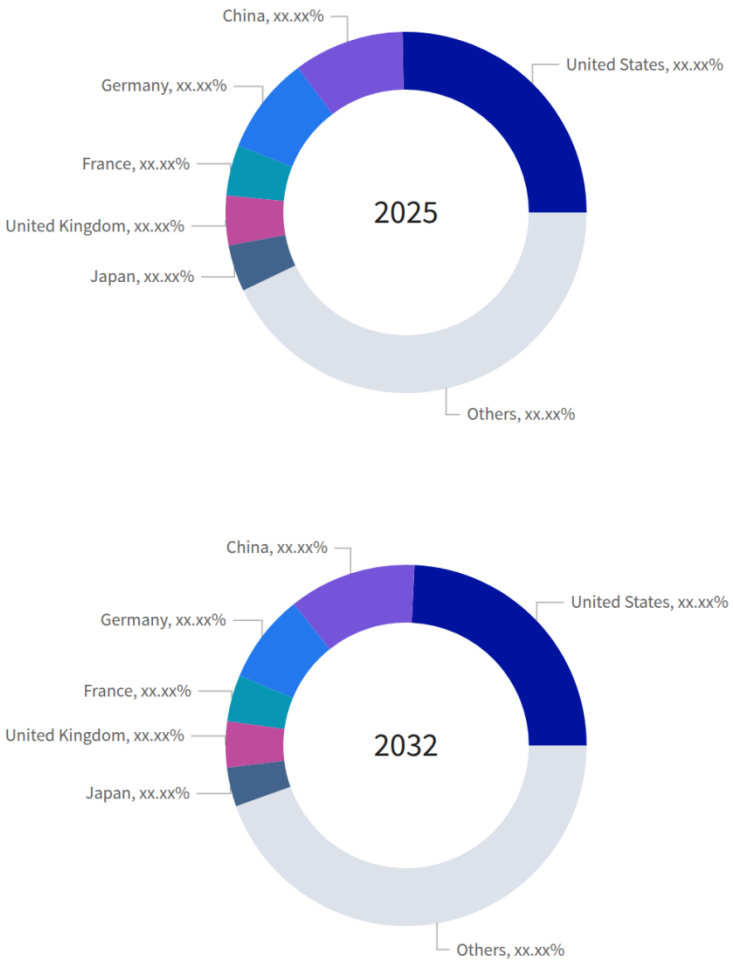


Figure 31. Global Post-Operative Wound Dressings Market Size, by Country, 2025 vs 2026 vs 2032

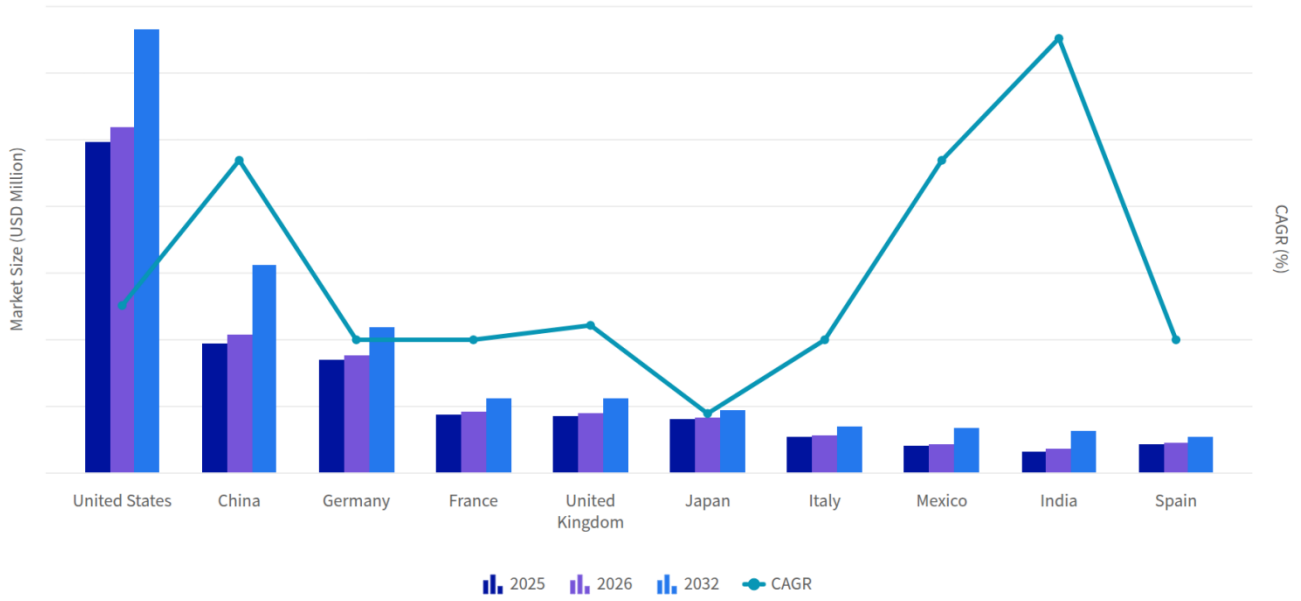


Table 373. Global Post-Operative Wound Dressings Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 374. Global Post-Operative Wound Dressings Market Size, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Molnlycke Health Care Pty Ltd - Adhesive bandage
   - The TGA permission dated June xx.xx 2023 requires healthcare-professional-supervision messaging with specified Mepilex Border Post Op consumer representations. ([tga.gov.au](https://www.tga.gov.au/resources/advertising-permissions/molnlycke-health-care-pty-ltd-adhesive-bandage))
2. Topical Oxygen Therapy (L37873)
   - Palmetto GBA's identified topical-oxygen LCD specifies noncoverage within its stated scope; it does not establish a universal US payer decision. ([cms.gov](https://www.cms.gov/medicare-coverage-database/view/lcd.aspx?lcdid=xx.xx))
3. Regulating medical devices in the UK
   - Qualifying legacy-directive general devices have an earlier-certificate-expiry or June xx.xx 2028 limit; MDR-compliant general devices have a June xx.xx 2030 limit, subject to stated conditions. The guidance distinguishes Great Britain and Northern Ireland. ([gov.uk](https://www.gov.uk/guidance/regulating-medical-devices-in-the-uk))
4. RT42-2025 Annexure C: Declaration Related to the Product Discontinuation of Items Submitted for the Bid
   - RT42-2025 Annexure C requires disclosure of known product-discontinuation plans and acknowledges possible bid rejection, establishing a supply-continuity condition rather than an award. ([etenders.gov.za](https://www.etenders.gov.za/home/Download/?blobName=e3f2f53b-1dc5-485a-98eb-8b39f5b1c0be.pdf&downloadedFileName=xx.xx.+RT42-2025+Annexure+C+Product+Discontinuation+form.pdf))

5. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

6. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

7. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

8. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

9. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

10. Convatec - Interim Results for the Six Months Ended 30 June 2026

    · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

11. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

    · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

    · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

12. NHS Supply Chain - Negative Pressure Wound Therapy
    - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
13. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
14. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
15. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
16. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
17. Anvisa - Medical devices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

18.1. United States

Table 375. United States Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United States	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 376. United States Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 377. United States Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 378. United States Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 379. United States Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 380. United States Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 381. United States Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 382. United States Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 383. United States Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 384. United States Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))
2. Solventum Corporation - 2025 Form 10-K
   - Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))
3. Smith+Nephew Fourth Quarter and Full Year 2020 Results
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))
4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans
   - Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))
6. Convatec - Interim Results for the Six Months Ended 30 June 2026
   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))
7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.
   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.2. China

Table 385. China Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
China	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 386. China Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 387. China Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 388. China Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 389. China Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 390. China Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 391. China Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 392. China Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 393. China Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 394. China Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: China's export exposure establishes production activity, not observed domestic postoperative purchases.

10. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

11. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
12. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

13. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

14. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

15. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
16. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
17. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
18. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
19. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
20. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

21. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
22. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
23. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
24. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
25. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

26. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
27. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
28. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
29. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

30. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
31. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
32. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

33. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
34. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

35. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
36. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
37. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
38. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
39. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
40. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
41. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

42. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
43. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
44. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
45. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

46. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
47. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

48. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
49. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

50. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

51. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

52. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
53. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
54. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
55. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

56. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

57. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
58. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
59. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
60. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

61. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

62. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

63. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

64. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

65. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

66. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

67. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

68. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

69. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
70. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
71. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

72. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
73. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
74. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

75. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.3. Germany

Table 395. Germany Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Germany	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 396. Germany Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 397. Germany Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 398. Germany Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 399. Germany Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 400. Germany Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 401. Germany Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 402. Germany Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 403. Germany Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 404. Germany Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))
63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))
64. HealthShare NSW - Procurement Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.4. France

Table 405. France Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
France	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 406. France Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 407. France Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 408. France Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 409. France Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 410. France Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 411. France Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 412. France Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 413. France Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 414. France Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.5. United Kingdom

Table 415. United Kingdom Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United Kingdom	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 416. United Kingdom Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 417. United Kingdom Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 418. United Kingdom Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 419. United Kingdom Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 420. United Kingdom Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 421. United Kingdom Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 422. United Kingdom Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 423. United Kingdom Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 424. United Kingdom Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy
   - Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and pump-rental lots support dressing-only accounting; supplier and catalog counts do not establish penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its

9. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The purchasing framework establishes category and ordering access, not annual postoperative drawdown or the modeled adoption factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

10. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

11. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
12. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

13. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

14. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

15. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
16. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
17. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
18. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
19. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
20. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

21. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
22. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
23. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
24. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
25. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

26. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
27. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
28. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
29. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

30. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
31. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
32. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

33. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
34. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

35. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
36. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
37. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
38. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
39. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
40. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
41. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

42. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
43. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
44. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
45. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

46. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

47. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

48. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
49. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

50. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

51. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

52. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
53. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
54. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
55. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

56. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

57. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
58. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
59. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
60. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

61. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

62. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

63. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

64. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

65. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

66. Medline - Consumer
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
67. PowerHeal Bandage - Shop
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))
68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.

70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.

73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.6. Japan

Table 425. Japan Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Japan	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 426. Japan Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 427. Japan Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 428. Japan Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 429. Japan Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 430. Japan Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 431. Japan Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 432. Japan Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 433. Japan Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 434. Japan Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.7. Italy

Table 435. Italy Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Italy	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 436. Italy Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 437. Italy Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 438. Italy Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 439. Italy Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 440. Italy Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 441. Italy Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 442. Italy Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 443. Italy Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 444. Italy Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.8. Spain

Table 445. Spain Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Spain	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 446. Spain Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 447. Spain Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 448. Spain Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 449. Spain Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 450. Spain Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 451. Spain Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 452. Spain Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 453. Spain Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 454. Spain Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.9. Mexico

Table 455. Mexico Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Mexico	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 456. Mexico Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 457. Mexico Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 458. Mexico Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 459. Mexico Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 460. Mexico Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 461. Mexico Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 462. Mexico Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 463. Mexico Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 464. Mexico Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Wadding, gauze and related medical articles: exports by country, 2023
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Companion-code exports support the Mexican cross-border-flow challenge.

10. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

11. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
12. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

13. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

14. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

15. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
16. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
17. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
18. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
19. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
20. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

21. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
22. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
23. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
24. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
25. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

26. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
27. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
28. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
29. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

30. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
31. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
32. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

33. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
34. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

35. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
36. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
37. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
38. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
39. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
40. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
41. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

42. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
43. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
44. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
45. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

46. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
47. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

48. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
49. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

50. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

51. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

52. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
53. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
54. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
55. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

56. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

57. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
58. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
59. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
60. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

61. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

62. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

63. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

64. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

65. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

66. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

67. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

68. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

69. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
70. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
71. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

72. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
73. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
74. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

75. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.10. Brazil

Table 465. Brazil Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 466. Brazil Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 467. Brazil Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 468. Brazil Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 469. Brazil Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 470. Brazil Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 471. Brazil Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 472. Brazil Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 473. Brazil Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 474. Brazil Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. Anvisa - Medical devices
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Brazil requires a legally constituted domestic partner for foreign suppliers' authorization arrangements; this is an access constraint, not a sales measure.

10. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

11. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
12. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

13. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

14. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

15. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
16. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
17. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
18. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
19. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
20. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

21. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
22. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
23. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
24. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
25. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

26. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
27. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
28. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
29. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

30. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
31. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
32. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

33. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
34. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

35. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
36. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
37. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
38. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
39. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
40. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
41. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

42. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
43. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
44. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
45. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

46. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
47. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

48. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
49. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

50. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

51. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

52. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
53. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
54. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
55. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

56. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

57. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
58. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
59. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
60. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

61. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

62. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

63. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

64. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

65. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

66. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

67. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

68. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

69. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
70. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
71. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

72. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
73. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
74. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

75. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.11. India

Table 475. India Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
India	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 476. India Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 477. India Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 478. India Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 479. India Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 480. India Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 481. India Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 482. India Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 483. India Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 484. India Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.

   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.

69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.

70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.12. Canada

Table 485. Canada Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 486. Canada Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 487. Canada Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 488. Canada Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 489. Canada Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 490. Canada Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 491. Canada Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 492. Canada Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 493. Canada Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 494. Canada Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.

35. Essity acquires advanced wound care company in US - December 29, 2021
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.

36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.

37. MaxioCel - What is MaxioCel?
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.

38. Schülke - Wound compendium
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.

39. MedCu - Advanced Copper-Based Wound Dressings
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.

40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.13. South Korea

Table 495. South Korea Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
South Korea	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 496. South Korea Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 497. South Korea Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 498. South Korea Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 499. South Korea Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 500. South Korea Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 501. South Korea Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 502. South Korea Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 503. South Korea Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 504. South Korea Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. Smith+Nephew Second Quarter and First Half 2026 Results
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.14. Australia

Table 505. Australia Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 506. Australia Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 507. Australia Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 508. Australia Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 509. Australia Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 510. Australia Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 511. Australia Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 512. Australia Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 513. Australia Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 514. Australia Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   - Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. NHSBSA Drug Tariff April 2025 - Part IXA
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

10. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
11. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

12. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

13. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

14. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
15. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
16. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
17. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
18. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
19. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

20. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
21. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
22. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
23. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
24. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

25. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
26. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
27. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
28. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

29. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
30. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
31. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

32. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
33. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

34. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
35. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
36. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
37. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
38. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
39. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
40. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

41. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
42. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
43. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
44. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

45. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

46. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

47. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
48. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

49. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

50. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

51. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
52. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
53. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
54. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

55. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

56. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
57. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
58. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
59. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

60. Solventum V.A.C. Therapy for Patients
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
61. NHS Supply Chain - National Pricing Matrices
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

62. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

63. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

64. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

65. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

66. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

67. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

68. Smith+Nephew Advanced Wound Management Product Catalog
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.

69. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.

70. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

71. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
72. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
73. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

74. Information for Clinical Choice - Gelling Fibre Dressings Support Document
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

18.15. Russia

Table 515. Russia Post-Operative Wound Dressings Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Russia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 516. Russia Post-Operative Wound Dressings Market Size, by Dressing Type, 2017-2040 (USD Million)

Dressing Type	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Absorbent Acrylic Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Acellular Extracellular Matrix Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Activated Charcoal Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Alginate Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Biocellulose Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Capillary Action Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Collagen Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Composite & Island Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Film & Membrane Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Foam Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gauze & Absorbent Pad Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gelling Fiber Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hyaluronic Acid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrocolloid Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hydrogel Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Superabsorbent Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wound Contact Layers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 517. Russia Post-Operative Wound Dressings Market Size, by Therapy Platform, 2017-2040 (USD Million)

Therapy Platform	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bioelectric Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Negative Pressure Wound Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Standard Dressing Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Topical Oxygen Therapy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 518. Russia Post-Operative Wound Dressings Market Size, by Antimicrobial Technology, 2017-2040 (USD Million)

Antimicrobial Technology	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Antibiotics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bismuth Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chitosan-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chlorhexidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Copper-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
DACC Microbial Binding	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Enzyme-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Honey-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iodine-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Agent Antimicrobial Systems	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
No Declared Antimicrobial Technology	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Octenidine	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Polyhexamethylene Biguanide	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Quaternary Ammonium Compounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Silver-Based Antimicrobials	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 519. Russia Post-Operative Wound Dressings Market Size, by Healing Pathway, 2017-2040 (USD Million)

Healing Pathway	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Closed Surgical Wounds	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Awaiting Surgical Closure	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Open Wounds Healing by Secondary Intention	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 520. Russia Post-Operative Wound Dressings Market Size, by Surgical Application, 2017-2040 (USD Million)

Surgical Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Cardiovascular Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ear, Nose, Oral & Throat Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Endocrine Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gastrointestinal & Abdominal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Gynecologic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hematologic & Lymphatic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Male Reproductive Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Musculoskeletal Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Neurological Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Obstetric Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ophthalmic Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Respiratory Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Skin & Breast Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Urinary Tract Surgery	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 521. Russia Post-Operative Wound Dressings Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Freestanding Surgical Centers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Home Healthcare Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hospitals	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Office-Based & Community Providers	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Residential & Post-Acute Care Facilities	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Self-Care Households	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 522. Russia Post-Operative Wound Dressings Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Institutional Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Direct-to-Consumer Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Retail & Dispensing	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale & Distribution	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 523. Russia Post-Operative Wound Dressings Market Size, by Fixation Design, 2017-2040 (USD Million)

Fixation Design	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bordered Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Borderless Adhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonadhesive Dressings	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 524. Russia Post-Operative Wound Dressings Market Size, by Absorbency, 2017-2040 (USD Million)

Absorbency	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Low Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Moderate Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nonabsorptive	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ultra-High Absorbency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Size and distribution of the global volume of surgery in 2012.
   · Evidence informing the 2017 market-value input; displayed series and growth include calculations: The underlying study estimates xx.xx operations globally in 2012, with a xx.xx-xx.xx confidence interval. This is the historical activity anchor, not an observed dressing-market value. ([stanfordhealthcare.org](https://stanfordhealthcare.org/publications/xx.xx/xx.xx.html))

2. Solventum Corporation - 2025 Form 10-K

   · Evidence informing the 2024 market-value input; displayed series and growth include calculations: Advanced Wound Care sales were USD xx.xx in 2024. The business includes activities beyond postoperative finished dressings and is used only as a broad commercial constraint. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Rental revenue cannot serve as a DTC dressing-sales numerator; attributable consumable consideration and purchasing-principal identity require separate treatment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/solv-xx.xx.htm))

3. Smith+Nephew Fourth Quarter and Full Year 2020 Results

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: Comparable Advanced Wound Care revenue fell from USD xx.xx in 2019 to USD xx.xx in 2020; Advanced Wound Devices fell from USD xx.xx to USD xx.xx. These observations constrain the modeled pandemic decline. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/33f321727e404f3c84f4483adbd486f3?v=fcbfaa8d))

4. Elective surgery cancellations due to the COVID-19 pandemic: global predictive modelling to inform surgical recovery plans

   · Evidence informing the 2020 market-value input; displayed series and growth include calculations: The study predicted xx.xx cancelled or postponed operations during xx.xx peak-disruption weeks. It supports a material activity shock, but is not an observed full-year cancellation census. ([bjssjournals.onlinelibrary.wiley.com](https://bjssjournals.onlinelibrary.wiley.com/doi/xx.xx/bjs.xx.xx))

5. Smith+Nephew Second Quarter and First Half 2026 Results

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half 2026 Advanced Wound Care revenue was USD xx.xx versus USD xx.xx; Advanced Wound Devices was USD xx.xx versus USD xx.xx. These broader categories support positive commercial momentum without directly measuring postoperative dressing growth. ([smith-nephew.stylelabs.cloud](https://smith-nephew.stylelabs.cloud/api/public/content/a7d555c46c15467eb98e59aa9a33a50d?v=a7317b8d))

6. Convatec - Interim Results for the Six Months Ended 30 June 2026

   · Evidence informing the 2026 market-value input; displayed series and growth include calculations: First-half Advanced Wound Care revenue was USD xx.xx in 2026 versus USD xx.xx, including InnovaMatrix revenue of USD xx.xx versus USD xx.xx. Excluding that adjacent exposure gives USD xx.xx versus USD xx.xx, illustrating the importance of a comparable product boundary. ([convatecgroup.com](https://www.convatecgroup.com/globalassets/convatec-h1-xx.xx-results--final-final.pdf))

7. Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial

   · Evidence informing the 2032 market-value input; displayed series and growth include calculations: The application-specific economic result constrains adoption assumptions; it does not establish a forecast commercial share.

   · Evidence informing the 2040 market-value input; displayed series and growth include calculations: The result supports retaining standard dressings as a counterforce to unrestricted long-term platform substitution.

8. NHS Supply Chain - Negative Pressure Wound Therapy

- Evidence informing the 2026 market-value input; displayed series and growth include calculations: The framework separately identifies consumables, pump purchases and pump rental, and includes portable equipment. This supports dressing-only accounting and the existence of continuation channels, not their global penetration. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing the 2027 market-value input; displayed series and growth include calculations: The published framework expires March xx.xx 2027. That contractual date is not treated as a global revenue discontinuity or proof of a successor arrangement. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate NPWT consumable procurement supports distinguishing dedicated NPWT dressing consideration from standalone standard-dressing offerings; it does not disclose their global value mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Five lots include consumables in Lot xx.xx and pump rental in Lot xx.xx. The March xx.xx 2021-March xx.xx 2027 framework supports commercial continuity and boundary separation, not the assumed global penetration rates.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumables and equipment arrangements support dressing-only valuation of closed-wound NPWT purchases rather than including pump consideration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Consumable procurement is distinct from pump rental; availability of continuation channels does not quantify global secondary-intention penetration.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Interim dressing expenditure must exclude separately arranged equipment and rental; the framework term does not establish a future global revenue discontinuity.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate consumable and equipment arrangements support dressing-only institutional attribution, excluding pump sales and rental from modeled value weights.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Portable-platform and consumable procurement establish continuation-channel availability, not its penetration or a guaranteed arrangement after the March xx.xx 2027 framework expiry.

9. WITS/UN Comtrade - Russian Federation medical wadding, gauze and related articles imports, 2021
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian imports of USD xx.xx anchor one component of the uncertain temporal bridge.
10. WITS/UN Comtrade - Russian Federation adhesive dressings imports, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed 2021 Russian adhesive-dressing imports of USD xx.xx provide the companion input; later-period purchasing is modeled.

11. NHSBSA Drug Tariff April 2025 - Part IXA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Tegaderm+Pad comparator: GBP0.xx.xx per listed unit.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Foam comparator GBP2.xx.xx; medium NPWT foam kit GBP29.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gelling-fiber comparators GBP2.xx.xx and GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: KerraMaxCare comparator GBP1.xx.xx; standalone PICO dressing listed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Leukomed Control comparator GBP2.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Promogran comparator GBP5.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: MaxioCel comparator GBP1.xx.xx; listing does not measure sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Activated-charcoal dressings have separate purchasing categories.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Vacutex comparator GBP1.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Suprasorb X comparator GBP4.xx.xx.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished antimicrobial gel listings establish outside-taxonomy parent activity; volumes remain assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Silver dressings provide representative monetary and construction comparisons.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PHMB dressing prices constrain value-versus-volume interpretation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper pricing supplies a relative-realization anchor, not supplier revenue.

12. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical routine surgical purchasing is a demand comparator for the conventional-dressing cohort, not a contemporary Global gauze share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Simple integrated surgical covers constrain the conventional purchasing model; historical unit observations are not value shares.
13. Achieving international consensus for the prevention of orthopaedic wound blistering: results of a Delphi survey
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: A small, industry-supported orthopaedic survey reports49.xx.xx% weighted initial foam-dressing use; this challenges extrapolating a universally conventional mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical survey reports2.xx.xx% Aquacel use; its procedure and sample biases prevent direct Global extrapolation.

14. CMS Surgical Dressings - Policy Article A54563
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The composite definition distinguishes conventional absorptive covers from foam, gelling-fiber, hydrocolloid and hydrogel constructions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Dressings applied within a billed professional service are not separately payable, distinguishing provider-provisioned products from independent supply purchases.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy supports separating eligible take-home supply relationships from dressings included in professional-service payment; no Global purchasing percentage is disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Defines adhesive-border wound covers through an integrated cover and distinct surrounding adhesive border; pad dimensions, rather than outer dimensions, support the classification and comparison premise used at both anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The policy explicitly distinguishes nonabsorptive contact layers from separate absorptive coverings, supporting the separate Nonabsorptive numerator at both anchors.

15. NHS Supply Chain Advanced Wound Care Specification
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Alginates and gelling fibers are separately identified within the purchasing specification.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate gelling-fiber recognition supports its retained commercial construction mapping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Superabsorbent dressings have a distinct purchasing grouping.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Collagen is recognized separately from temporary matrix dressings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Temporary matrix purchasing requirements support a nonimplant boundary but do not establish universal eligibility of acellular products.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Biocellulose is explicitly recognized as a specialty construction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The procurement specification defines Low using total fluid handling of xx.xx-xx.xx g/xx.xx cm^2; this supplies a classification boundary, not a sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Moderate as xx.xx-xx.xx g/xx.xx cm^2, constraining classification at both modeled anchors.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines High as xx.xx-xx.xx g/xx.xx cm^2; qualitative supplier descriptions are not independent revenue observations.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The specification defines Ultra-High as at least xx.xx g/xx.xx cm^2, without establishing an international sales distribution.

16. FDA K210024 - NeoMatriX Wound Matrix
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: NeoMatriX uses collagen-dressing terminology while identifying acellular-matrix characteristics; regulatory naming cannot uniquely allocate these peers.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The record establishes an acellular wound-dressing identity with surgical-wound indications, supporting product-specific precedence rather than a revenue observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regulatory offering context is kept separate from sales weighting; no clearance-derived revenue or adoption rate is assumed.
17. AccessGUDID - OASIS, Device Identifier 00827002466234
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The OASIS device record identifies a wound-matrix dressing in commercial distribution; it does not separate postoperative sales or establish a Global share.
18. FDA K261311 - HYALOMATRIX Clearance and 510(k) Summary
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September2,2026 HYALOMATRIX clearance concerns an updated presentation against an earlier predicate; it supports continuing category identity, not a first-launch uplift.
19. FDA 510(k) Premarket Notification K073251 - HYALOMATRIX PA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The earlier HYALOMATRIX PA regulatory record supports pre-existing category identity; it supplies neither2025 realized sales nor a forecast adoption rate.
20. Journal officiel, 6 September 2013 - IALUSET PLUS transfer prices, reimbursement tariffs and retail price ceilings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical maximum transfer price for ten IALUSET+ pads was EUR16.xx.xx from April2014; this anchors an ordinary-pad commercial tier, not a current Global ASP.
21. Rhode Island Medicaid Fee Schedule 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2021 OASIS Ultra rate of USD4.xx.xx per square centimetre is an adjacent historical reimbursement comparator used only in an explicit commercial valuation bridge.

22. Convatec 2025 Annual Results Transcript - 24 February 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported ConvaFoam expansion supplies a directional commercial input, not a measured postoperative construction growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported Aquacel performance and4.xx.xx% wound-care growth excluding InnovaMatrix support selective expansion while leaving the forecast participation factor assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: InnovaMatrix revenue fell by USD30 million to USD69 million; this adjacent payment-sensitive exposure challenges indiscriminate matrix growth rather than measuring qualifying postoperative matrix sales.
23. Smith+Nephew - German consensus guidance for single-use NPWT, 6 July 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: PICO's disclosed superabsorbent-core architecture supports construction mapping and the forecast model's separate superabsorbent platform-content allocation; it does not establish sales share.
24. Medline - Amplify What's Possible: Wound Care and Skin Health Portfolio, 24 April 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 company portfolio identifies chitosan-based Opticell, supporting specialty-material precedence over generic gelling-fiber naming without measuring2025 revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The2018 portfolio already identifies hyaluronic-acid-based Hyalomatrix, independently challenging treatment of the2026 updated clearance as a first product launch.
25. FDA K143124 - KA01 Chitosan Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January26,2015 clearance identifies KA01 Chitosan Wound Dressing with surgical-wound indications; it establishes category history rather than continuing Global availability or sales.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Chitosan construction and surgical applications do not independently establish antimicrobial positioning; this constrains classification.
26. Hospital Chargemaster, July 3, 2020 - JumpStart Dressing Line Items
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Page xx.xx lists a JumpStart dressing charge of USD xx.xx with a January xx.xx 2020 effective date. This is the historical charge-level input for an explicitly assumed rebase and first-sale realization bridge, not an observed net supplier price or future price.

27. Connecticut Office of Health Strategy - Stamford Price Master, January 31, 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2018 price master lists different JumpStart configurations at USD xx.xx USD xx.xx, USD xx.xx, USD xx.xx, USD xx.xx and USD xx.xx. The dispersion qualifies any uniform-price assumption but is not a time series of inflation or global first-sale revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical configuration-specific charges provide an independent price-level comparison for the modeled bioelectric basket; no catalog-count allocation or charge-to-revenue equivalence is assumed.
28. Vomaris Innovations - Corporate Overview, 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 corporate overview reports more than one million wounds treated cumulatively and active commercialization in nine countries. These manufacturer-reported commercial aggregates constrain a niche-scale interpretation but do not establish annual postoperative revenue or forecast uptake.
29. Vomaris - Buy Products
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The buying page distinguishes professional Procellera inquiries from the JumpStart specialty route and identifies exclusive Arthrex access for the specified surgical specialties. This supports channel existence and restrictions, not a measured purchasing conversion rate.
30. Arthrex - JumpStart Antimicrobial Wound Dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The surgical product catalog includes a ClearFit product-highlight entry dated October xx.xx 2024 and subsequent commercial materials. This independently corroborates a marketed surgical offering before the base year and continued product support, not recognized sales or the selected forecast penetration.

31. OxyBand Technologies - FDA Clearance
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Manufacturer information identifies clean closed surgical incisions and skin-graft donor sites within prescription applications and distinguishes OTC scope. This supports postoperative finished-dressing attribution but supplies neither annual sales nor a verified net price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The stated clean-closed-incision indication supports a category boundary, not a numerical revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Other stated dressing uses do not establish attributable postoperative secondary-intention sales; no allocation is inferred from clearance alone.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published indications do not independently quantify eligibility or purchasing value for wounds awaiting surgical closure.
32. OxyBand Technologies - Commercial Sales: Purchase Orders
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer publishes a commercial purchase-order route with credit approval and net-xx.xx terms. This corroborates a purchasing relationship without measuring 2025 order volume, global access or future adoption.
33. CMS Medicare Coverage Database - Topical Oxygen Therapy, LCD L37873
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Palmetto local determination establishes noncoverage within its defined topical-oxygen service scope and jurisdiction. It was originally effective May xx.xx 2019, with the inspected revision effective April xx.xx 2026. It supports a payment-access caution, not universal dressing noncoverage or a zero category share.

34. Antimicrobial wound dressings (AWDs) for chronic wounds - Health technology assessment report 13, December 2015
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical all-wound antimicrobial expenditure calibrates the declared-technology budget, not current global postoperative penetration.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level silver spending anchors the monetary weight; inconsistent printed totals are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate povidone-iodine and cadexomer-iodine expenditure anchors the combined iodine weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Honey expenditure supplies a historical value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Polihexanide expenditure supplies a historical PHMB value-mix input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Glucose-oxidase gel expenditure supplies the enzyme-family monetary proxy.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Board-level DACC expenditure anchors its historical weight; forecast changes are separately assumed.
35. CMS Local Coverage Determination - Surgical Dressings, L33831
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Finished-product coverage conditions constrain assumptions about universal premium conversion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify silver-related access assumptions without proving universal exclusion.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Material-specific limitations qualify honey-related purchasing assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Copper positioning alone cannot establish finished-product coverage or reimbursed adoption.

36. FDA K190268 - Hydrofera Blue READY-Border, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The finished foam offering contains two antibacterial dyes and includes post-surgical incisions; this establishes mapping, not revenue.
37. Essity acquires advanced wound care company in US - December 29, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hydrofera reported USD xx.xx net sales for nine months of 2021, anchoring annualization and explicitly assumed attribution.
38. FDA K152970 - Dynarex Xeroform Petrolatum Dressing, 510(k) Summary
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The regulatory summary establishes a bismuth-containing surgical dressing; declaration eligibility and sales remain modeled.
39. MaxioCel - What is MaxioCel?
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The offering's own commercial description expressly presents antimicrobial chitosan positioning, without quantifying sales.
40. Schülke - Wound compendium
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier compendium separates wound gel from irrigation products and includes surgical positioning; sales attribution remains assumed.
41. MedCu - Advanced Copper-Based Wound Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier's copper-dressing portfolio explicitly includes surgical wounds, supporting commercial mapping rather than adoption volume.
42. Healthium Medtech introduces surgical wound dressing with patented infection-prevention technology - October 26, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated surgical-dressing launch and own-company hospital network constrain addressability, not realized product adoption.

43. Quick-Med Technologies - Form 10-K for the fiscal year ended June 30, 2011
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Historical BIOGUARD royalties and contractual rates provide a qualified commercial magnitude check, not current postoperative sales.
44. HPRA - Sofra-Tulle withdrawn medicine record
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Irish withdrawal record prevents treating Sofra-Tulle as current Irish activity; it does not establish global sales or zero.
45. Smith+Nephew - BACTIGRAS chlorhexidine acetate gauze dressing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manufacturer's BACTIGRAS listing establishes a chlorhexidine finished-dressing category, not quantified postoperative sales.
46. Recommendations for Preventing and Managing Surgical Wound Complications - May 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary closure and incisional NPWT definitions support closed-wound purchasing attribution; they do not establish its sales percentage.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-intention definitions support separating continued open-wound purchases from purchases associated with planned surgical closure.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed surgical closure supplies the category boundary for interim open-wound expenditure; subsequent closed-stage purchases must not remain assigned here.

47. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK open-wound utilization observations constrain the modeled open NPWT activity, and therefore the remaining closed NPWT allocation, without directly measuring global sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported snapshot, baseline and whole-course NPWT exposure provide distinct calibration bounds; they are not interchangeable annual penetration measures.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The secondary-intention study population does not establish the planned delayed-closure mix, requiring a separate explicit attribution assumption.

48. Negative Pressure Wound Therapy vs Conventional Wound Treatment in Subcutaneous Abdominal Wound Healing Impairment: The SAWHI Randomized Clinical Trial

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The SAWHI trial documents transitions from open to surgically closed wounds, supporting purchase-stage accounting rather than assigning an entire episode permanently to its initial pathway.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Case-specific alternative closure outcomes qualify the assumption that all open-wound expenditure belongs to secondary-intention healing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Delayed-closure event counts constrain the approximate awaiting-closure attribution priors, with explicit adjustments and uncertainty for case mix, timing and value conversion.

49. **Negative pressure wound therapy versus usual care in patients with surgical wound healing by secondary intention in the UK (SWHSI-2): an open-label, multicentre, parallel-group, randomised controlled trial**
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The studied secondary-intention population cannot establish closed-incision commercial performance; the forecast's closed-wound shift remains a modeled assumption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application-specific clinical and economic result supports retaining conventional expenditure and restraining assumed open-care premium substitution.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Exclusion of planned delayed closure prevents transferring the trial's result directly to the awaiting-closure category.
50. **Smith+Nephew Second Quarter and First Half 2026 Results**
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Device-category growth and continuing PICO investment provide a commercial adoption check, but do not verify the forecast closed-incision dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Strong post-acute RENASYS performance and emerging-market expansion qualify a blanket open-NPWT contraction assumption and support retaining open-care activity.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosure separates commercial channels but not planned-closure pathways; the awaiting-closure forecast remains explicitly modeled.

51. Number of all-listed procedures for discharges from short-stay hospitals, by procedure category and age: United States, 2010
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient endocrine-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Inpatient ophthalmic-count primitive; modeled purchase bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ear and oral-system anatomical-count primitives.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Respiratory counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Cardiovascular counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Hemic/lymphatic-count primitive; assumed ambulatory uplift.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Digestive counts; selected nonqualifying activity removed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Urinary-count primitive; explicit scope adjustments.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Male-genital-count primitive; newborn coverage limitation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Female-genital anatomical-count primitive; modeled eligibility bridge.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Musculoskeletal-count primitive; modeled episode correction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Integumentary-count primitive; explicit debridement adjustment.

52. Ambulatory Surgery Data From Hospitals and Ambulatory Surgery Centers: United States, 2010 - National Health Statistics Reports Number 102

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; nonqualifying injection activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory-count primitive; paired lens-code correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory ear and oral-system count primitives.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory respiratory-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory cardiovascular-count primitive; scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory digestive counts; nonqualifying activity excluded.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory urinary counts; explicit eligibility correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory male-genital-count primitive; modeled global bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory female-genital counts; explicit scope correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory musculoskeletal counts; modeled episode correction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ambulatory integumentary counts; office coverage limitation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2010 US survey reports xx.xx% of ambulatory procedures in hospitals. This historical setting input is adjusted for Global scope and dressing value.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: ASCs represented xx.xx% of the survey's ambulatory surgical and nonsurgical procedures; the model applies explicit scope, geography and value adjustments.

53. Caesarean section rates continue to rise, amid growing inequalities in access
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported xx.xx% caesarean rate and projected xx.xx% rate for 2030 constrain the explicit obstetric activity scenario; neither is a measured 2025 dressing share.
54. Cataract surgery - After cataract surgery
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pad-and-shield or shield-only coverage supports non-universal pad purchasing, not the assumed global utilization factor.
55. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The arthroplasty comparison supports application-specific differentiation, not measured purchasing penetration or the forecast uplift.
56. Overview of Major Ambulatory Surgeries Performed in Hospital-Owned Facilities, 2019 - Statistical Brief #287
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2019 record identifies xx.xx major ambulatory encounters in hospital-owned facilities, constraining any blanket allocation of outpatient surgery to freestanding centers.

57. The epidemiology, management and impact of surgical wounds healing by secondary intention: a research programme including the SWHSI feasibility RCT

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Secondary-care observations supply the hospital continuation proxy; the conversion to attributable dressing-value exposure is modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Primary-care and community observations anchor the office/community continuation proxy, with an explicit Global responsibility adaptation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure constrains the continuation pool; its residential subdivision is an assumption, not a reported purchasing percentage.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Community exposure anchors professional continuation demand; the home-health purchasing fraction and forecast shift are modeled.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The continuation pool supports a household attribution model, but the study does not measure independently purchased household dressing revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The xx.xx-patient historical UK cohort's wound-contact incidence supports a narrowly scoped prolonged-care purchasing proxy, with an explicit modeled repeat-purchase adjustment.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reported absorptive-product incidences constrain the scale of the prolonged-care basket; allocation to Moderate requires separate assumed product-band and relative-price bridges.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same historical basket supports the prolonged-care activity bridge, not a direct equivalence between a material label and the High band.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The cohort supports prolonged absorptive purchasing activity; the Ultra-High fraction and its forecast persistence remain assumptions rather than observed shares.

58. March 2026 Report to the Congress: Medicare Payment Policy - Chapter 11, Ambulatory surgical center services: Status report
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 activity assessment distinguishes modest aggregate ASC growth from rapid selected orthopedic growth, limiting assumptions about wholesale hospital displacement.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Aggregate ASC services rose xx.xx% in 2024, while knee and hip volumes rose xx.xx% and xx.xx%; these observations constrain selective migration assumptions.
59. Medicare Claims Processing Manual, Chapter 14 - Ambulatory Surgical Centers
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Surgical dressings furnished with ASC surgery are included in facility services, supporting attribution to the center rather than an assumed independent household transaction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The manual distinguishes physician-office dressings from ASC facility services, supporting a separate office purchasing role.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Subsequent eligible patient-obtained dressings can follow a separate supply route; this establishes attribution boundaries, not household market share.
60. Medicare Benefit Policy Manual, Chapter 7 - Home Health Services
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ordinary medical supplies under a Medicare home-health plan of care are bundled, supporting agency-responsibility attribution with applicable exceptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Home delivery does not by itself establish household procurement; ordinary medical supplies and DME-related arrangements have different responsibility rules.
61. SNF Consolidated Billing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Covered Part A SNF stays generally use consolidated billing, while noncovered stays differ; residential purchases require responsibility-based attribution rather than a universal payer assumption.

62. Solventum V.A.C. Therapy for Patients

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient replenishment operates within a professionally directed arrangement dependent on documentation for insurance billing; digital access does not establish agency-attributable sales.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing ordering and possible personal payment responsibility establish distinct commercial arrangements, not unrestricted household purchasing or a disclosed household revenue split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Patient-facing replenishment ordering operates alongside prescribing and insurance-documentation requirements. This supports a controlled commercial route, not unrestricted purchasing or a measured channel share. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))

63. NHS Supply Chain - National Pricing Matrices

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commitment-linked discounts for Advanced Wound Care support using net realization rather than list prices; matched hospital purchasing discounts are not disclosed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The discount mechanism constrains institutional value comparisons but does not establish the model's ASC-to-hospital relative dressing-value factor.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supplier-approved value or volume commitments demonstrate that purchasing terms can differ; the office/community realization adjustment remains an explicit assumption.

64. Medline Inc. - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: 2025 US Prime Vendor own-brand sales of USD xx.xx support the institutional offering-owner direct-sales proxy, subject to broad medical-surgical scope adjustment. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Third-party Prime Vendor sales of USD xx.xx are reseller-level revenue; the model removes an assumed uplift before comparison with offering-owner first sales. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/mdln-xx.xx.htm))

65. Smith+Nephew - Annual Report 2025, Note 2: Business Segment Information

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The audited revenue policy identifies relatively greater direct hospital sales in Advanced Wound Devices in established markets, supporting the model's higher institutional direct propensity for NPWT dressing content. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Most Advanced Wound Management business, particularly community and home-care products, passes through wholesalers and distributors. This constrains route assumptions but is not a postoperative Global percentage. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/snn-20260331xex99d1.htm))

66. HealthShare NSW - Procurement Services

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Direct procurement is distinguished from contracted-distributor supply, supporting classification by purchasing relationship rather than catalog interface. No sales weight is disclosed. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Where a contracted distributor supplies the customer, supplier information passes through that distributor. This supports a distinct intermediary route, not its Global prevalence. ([healthshare.nsw.gov.au](https://www.healthshare.nsw.gov.au/services/procurement-services))

67. NHS Shared Business Services - Advanced Wound Care and Lymphoedema Products and Services Framework Agreement

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Under total purchase, dressing ownership remains with the purchasing organization. Institutional ownership can therefore persist despite patient-facing fulfillment. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Organizational ownership and online ordering provide a counterexample to treating household delivery or digital ordering automatically as DTC sales. No Global revenue split is published. ([sbs.nhs.uk](https://www.sbs.nhs.uk/services/framework-agreements/advanced-wound-care-and-lymphoedema-products-and-services/))

68. Medline - Consumer

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The consumer portfolio includes postoperative wound products and identifies independent retail and pharmacy outlets, establishing retail participation without measuring its attributable revenue. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same portfolio separately links the owner's consumer storefront, supporting coexistence of owner-direct and reseller channels rather than a single undifferentiated online channel. ([medline.com](https://www.medline.com/about-us/who-we-serve/consumer/))

69. PowerHeal Bandage - Shop

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The current branded shop places surgical incisions within prescription use. This constrains unrestricted consumer-adoption assumptions without establishing 2025 sales or a 2032 percentage. ([powerhealbandage.com](https://powerhealbandage.com/collections/shop))

70. Smith+Nephew Advanced Wound Management Product Catalog
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately markets bordered foam offerings for surgical wounds, supporting category mapping but not their sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Identifies ALLEVYN GENTLE as nonbordered with adhesive, establishing a distinct commercial offering rather than a nonadhesive synonym.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies ALLEVYN Non-Adhesive and surgical-wound applications; portfolio presence supports mapping, not global revenue share.
71. NHS Clinical Evaluation Team - Non-Woven Island Dressings Clinical Review, October 2018
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports historical national-distributor purchases of just under xx.xx nonwoven island dressings and spending above GBP xx.xx, supporting persistent low-cost bordered purchasing without establishing current global share.
72. Three wound-dressing strategies to reduce surgical site infection after abdominal surgery: the Bluebelle feasibility study and pilot RCT
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Institutional default selection and procurement cost constraints challenge automatic conversion to premium bordered offerings; the study does not disclose fixation sales shares.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Provides independent purchasing-behavior counterevidence to treating commercial availability as unrestricted borderless adhesive adoption.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports retaining conventional purchasing and cost counterforces rather than assuming universal replacement of separately sourced dressing offerings.

73. Solventum Launches All-In-One, Extended-Wear Wound Dressing for V.A.C. Therapy
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Documents the September xx.xx 2024 launch of an integrated dressing-and-drape offering, initially available in the United States and Canada; supports commercial availability, not the modeled adoption percentages.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Contrasts integrated offerings with traditional separate-component NPWT dressings, supporting the commercial distinction used in the substitution assumption.
74. Solventum Q2 2025 Shareholder Letter - August 18, 2025
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reports European expansion of the integrated dressing launch and a dedicated acute-care sales team, supporting a limited diffusion premise rather than a quantified future market share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Commercial expansion supplies a directional substitution premise against component-based purchases; the extent of displacement remains an explicit forecast assumption.
75. Information for Clinical Choice - Foam Dressings
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The older comparison reports total fluid handling of xx.xx for ActivHeal Border Lite despite a High label; the accepted numerical boundaries place that comparator in Moderate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FoamLite's reported total-fluid-handling value of xx.xx supplies a high-band representative-product anchor, not a market-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: FarlaFOAM-S's reported total-fluid-handling value of xx.xx supplies an ultra-high representative-product anchor; global purchasing weights remain modeled.

76. Information for Clinical Choice - Gelling Fibre Dressings Support Document

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The gelling-fibre comparison uses free-swell absorbency rather than the accepted total-fluid-handling basis, constraining cross-material attribution to Moderate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published High labels on the free-swell basis are not copied into this High-band revenue numerator.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published Ultra-High free-swell labels do not establish equivalent total-fluid-handling classification or attributable revenue.

19. Competitive Landscape

19.1. Market Share Analysis, 2025

[redacted] This supports competition among accepted offerings, not unrestricted substitution between material labels. An entrant needs an orderable product and an accountable supply route; an incumbent's broader catalog does not establish exclusive access to the account.

Therapy-linked relationships compete on more than the dressing itself. [redacted] A competing consumables route is commercially useful only if equipment access, accepted products, and ongoing responsibilities remain covered.

Broad medical-surgical suppliers combine different roles. Medline Inc. identifies an own-brand Optifoam Gentle Post-Op offering; Cardinal Health's Canadian catalog advertises a composite dressing with postoperative applications. [redacted] Buyers can compare ordering relationships and local obligations across these routes, but should not interpret the reseller names as separate sources of product ownership or infer manufacturer authorization from a listing alone. Channel switching is attractive only when the replacement seller can undertake the required fulfillment and customer-support duties.

[redacted] These are identifiable purchasing leads, not evidence that the

channels control the underlying brands or hold equivalent distribution rights. Buyers should compare the exact supplying entity, product status, and binding delivery arrangement before replacing a local route.

[illegible] Panamed Philippines Inc. lists DR Sofsorb for postoperative incision sites, while Zafire Distributors, Inc. advertises Lohmann & Rauscher Suprasorb X+PHMB for postoperative wounds. These companies add local supplier alternatives, but represented-product rights, registration responsibility, and continuing delivery remain distinct from the upstream manufacturer's capability.

Gulf account access ranges from specific represented products to broader portfolio positioning. [illegible] A buyer should prefer the route that identifies the required product and accepts local obligations, rather than assume that regional reach establishes equal access.

South African and East African examples show why local manufacture and distribution should be compared separately. [illegible] Local presence alone does not establish a public award or a comparative delivery advantage.

[illegible] Reavley Chemist GH's Elastoplast listing is marked sold out, illustrating that an advertised route need not be an available replenishment commitment. Buyers and discharge coordinators should confirm the accountable seller, exact product, payment responsibility, and delivery destination before relying on these routes for continuity.

Figure 32. Global Post-Operative Wound Dressings Market Share, by Key Player, 2025

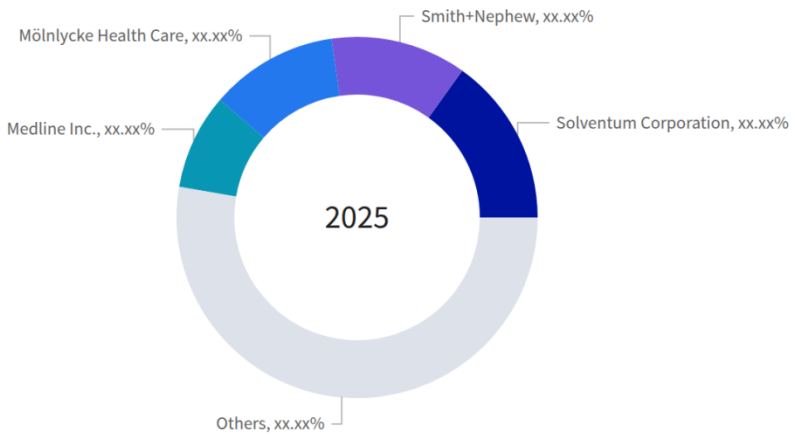


Table 525. Global Post-Operative Wound Dressings Market Share, by Key Player, 2025

Key Player	Share (%)
Advanced Medical Solutions Group plc	xx.xx
Allmed Medical	xx.xx
Aroa Biosurgery Limited	xx.xx
Coloplast	xx.xx
Convatec	xx.xx
Essity	xx.xx
Lohmann & Rauscher	xx.xx
Medline Inc.	xx.xx
Mölnlycke Health Care	xx.xx
NICHIBAN Co., Ltd.	xx.xx
PAUL HARTMANN AG	xx.xx
Smith+Nephew	xx.xx
Solventum Corporation	xx.xx
URGO Medical	xx.xx
Winner Medical Co., Ltd.	xx.xx
Zhende Medical	xx.xx
Others	xx.xx

Sources & Evidence

1. V.A.C. Therapy patient support
   - Solventum describes V.A.C. equipment, replenishment, support, and documentation-dependent billing responsibilities. ([solventum.com](https://www.solventum.com/en-us/home/medical/advanced-wound-care/negative-pressure-wound-therapy/vac-therapy/vac-for-patients/))
   - Evidence informing base-year company-share estimates: Describes patient-facing equipment, replenishment, return and billing responsibilities; supports separation of commercial support conditions from dressing revenue, not a numerical adoption rate.
2. Advanced Wound Care
   - The framework identifies diverse suppliers and purchasing routes. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/advanced-wound-care/))
3. Optifoam Gentle Post-Op Foam Wound Dressings
   - Medline's catalog identifies Optifoam Gentle Post-Op Foam Wound Dressings.
4. Negative Pressure Wound Therapy
   - The NPWT framework identifies alternative suppliers, including Smith & Nephew, and distinct equipment arrangements. ([supplychain.nhs.uk](https://www.supplychain.nhs.uk/product-information/contract-launch-brief/negative-pressure-wound-therapy/))
5. Cardinal Health Composite Dressing
   - Cardinal Health's Canadian catalog advertises its composite dressing with postoperative applications.
6. McKesson Advanced Wound Care Catalog
   - McKesson's catalog includes own-brand island dressings and a medical-surgical ordering route.
7. Essential Products for Ambulatory Surgery Centers
   - Dukal presents dressings and absorbent products within an ambulatory-surgery assortment.
8. Island Dressings - Sterile
   - Dynarex advertises sterile island dressings.
9. Mepore Self-Adhesive Absorbent Post-Operative Dressing
   - Surgo advertises Mepore postoperative dressings and identifies the Mölnlycke brand.
10. Dressing OPSITE Post-Op
    - Stevens catalogs Smith+Nephew OPSITE Post-Op.
11. OpSite Post-Op, Folienverbände
    - Henry Schein Medical GmbH lists OPSITE Post-Op with postoperative-wound positioning.
12. Opsite Post-Op Apósito Quirúrgico con Film Adhesivo
    - VitalHealth advertises OPSITE Post-Op as a surgical and postoperative dressing.
13. Catálogo Cuidado de Heridas
    - JTC's wound-care catalog includes AQUACEL surgical dressings.
14. Línea Cuidado de heridas
    - Medicox advertises postoperative Mepilex and Telfa-related products.
15. Allevyn Sacrum
    - Tagumedica lists ALLEVYN Sacrum with surgical-wound applications.
16. Apósito Primapore Smith & Nephew
    - Ortopedia Suiza advertises Primapore for postoperative surgical wounds.
17. Wound Management
    - Diagno-Pharm advertises Diagno-Med Compress and Diagno-Wound postoperative dressings.
18. Products - MULTI FIX-PAD
    - SM Health Care catalogs MULTI FIX-PAD for postoperative wounds.

19. Non Adhesive / Adhesive Alginate Dressing
    - Filta Safety offers adhesive and nonadhesive alginate dressings with postoperative-incision applications.
20. Advance Wound Care
    - SOZA Healthcare advertises RTD Wound Dressing with surgical/postoperative applications.
21. DR Sofsorb Absorbent Wound Dressing
    - Panamed Philippines lists DR Sofsorb for postoperative incision sites.
22. Perioperative & Wound Care: Supra X+PHMB
    - Zafire advertises L&R Suprasorb X+PHMB with postoperative applications.
23. Advanced Wound Care Products & Dressings
    - Cardio Edge advertises AQUACEL Surgical and AQUACEL Ag Surgical.
24. Wound Care
    - Croyance describes a wound-care distribution portfolio addressing postoperative wounds.
25. Wound Care
    - Pureline advertises a wound-care portfolio that includes postsurgical wounds.
26. Optimal Waterproof Dressing
    - PARADIZ lists an Optimal waterproof dressing with postoperative positioning.
27. Medrull
    - Super Care describes a Medrull agency and advertises postoperative dressings; these are its own commercial representations.
28. Beier Drawtex Healthcare
    - Beier identifies locally manufactured Drawtex and Maisha Medical as its local distributor.
29. CritiCare Waterproof Film Island Dressing
    - Be Safe Paramedical advertises CritiCare Waterproof Film Island Dressing for postsurgical wounds.
30. Laparoscopy Dressing
    - Euromed Surgicals identifies a Kenyan laparoscopy-dressing offering for small postoperative incision sites.
31. Mepore Adhesive Surgical Dressing
    - GoMed advertises Mepore Adhesive Surgical Dressing with postoperative positioning.
32. Product Catalogue - IRAP Non-Pharma Limited
    - IRAP Non-Pharma's catalog lists Primapore Adhesive Dressings.
33. Elastoplast Sterile Waterproof Dressing XXL
    - Reavley Chemist GH advertises Elastoplast postoperative dressings; the inspected listing is marked sold out.
34. Surgin Pad Surgical Dressing
    - Healthway advertises Surgin Pad Surgical Dressing with postoperative-recovery positioning.
35. Solventum Corporation - 2025 Form 10-K
    - Evidence informing base-year company-share estimates: Reports 2025 Advanced Wound Care sales of USD xx.xx and Infection Prevention and Surgical Solutions sales of USD xx.xx.
    - Evidence informing base-year company-share estimates: Reports USD xx.xx of durable-medical-device rental revenue within MedSurg; the model explicitly assumes its assignment to the wound-care pool before exclusion.
36. Solventum - 2025 Investor Day Presentation
    - Evidence informing base-year company-share estimates: Separates NPWT, advanced wound dressings and advanced skin care within the commercial portfolio, supporting distinct scope adjustments rather than whole-pool attribution.
37. Smith+Nephew - Fourth Quarter and Full Year 2025 Results
    - Evidence informing base-year company-share estimates: Reports 2025 Advanced Wound Care, Advanced Wound Devices and Advanced Wound Bioactives revenue pools of USD xx.xx, USD xx.xx and USD xx.xx.
    - Evidence informing base-year company-share estimates: These broader financial categories constrain the modeled numerator but do not disclose postoperative dressing sales.

38. Mölnlycke Annual Report 2025
    - Evidence informing base-year company-share estimates: The 2025 segment note reports EUR xx.xx of Wound Care revenue, including EUR xx.xx through distributors and EUR xx.xx directly to customers.
    - Evidence informing base-year company-share estimates: The commercial portfolio combines incision care, chronic-wound products and Avance Solo, supporting differentiated scope assumptions rather than treating all revenue as postoperative.
39. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement; Mepilex Border Post-Op versus Aquacel surgical
    - Evidence informing base-year company-share estimates: Identifies the published postoperative comparison of Mepilex Border Post-Op and AQUACEL Surgical; it does not measure purchasing conversion or supplier revenue and is not used as a share weight.
40. Convatec - FY25 Results
    - Evidence informing base-year company-share estimates: Reports 2025 Advanced Wound Care revenue of USD xx.xx, including USD xx.xx excluding InnovaMatrix and USD xx.xx of InnovaMatrix revenue.
    - Evidence informing base-year company-share estimates: Provides distinct financial pools for conventional advanced-dressing attribution and the limited qualifying matrix allowance.
41. AQUACEL SURGICAL cover dressing
    - Evidence informing base-year company-share estimates: Identifies AQUACEL SURGICAL as a finished postoperative cover, supporting single-offering attribution rather than counting its constituent materials separately.
42. HARTMANN by number
    - Evidence informing base-year company-share estimates: Reports 2025 Wound Care revenue of EUR xx.xx and xx.xx% organic growth, with commercial participation in traditional, advanced and Vivano NPWT products.
    - Evidence informing base-year company-share estimates: Provides the peer inputs of EUR xx.xx Wound Care revenue, EUR xx.xx Infection Management revenue and xx.xx% wound-care organic growth used in the explicitly assumed L&R comparability and temporal bridges.
43. Cosmopor Steril
    - Evidence informing base-year company-share estimates: Identifies Cosmopor Steril as a postsurgical finished dressing; supports the conventional-cover role but not its assumed revenue weight.
44. Essity - Health & Medical
    - Evidence informing base-year company-share estimates: Reports 2025 Health & Medical net sales of SEK xx.xx and describes wound care, compression, orthopedics and incontinence activities; the full business-area revenue is not treated as wound revenue.
45. Essity - Interim Report Quarter 2, 2025
    - Evidence informing base-year company-share estimates: The second-quarter 2025 report identifies Medical Solutions as xx.xx% of Health & Medical quarterly net sales. The model explicitly assumes that proportion for the annual bridge.
46. Leukomed Sorbact - bacteria- and fungi-binding surgical dressing
    - Evidence informing base-year company-share estimates: Identifies Leukomed Sorbact as a surgical dressing and supplies commercial ordering references; supports participation and product-role attribution, not postoperative sales volume.
47. L&R Sustainability Report 2024
    - Evidence informing base-year company-share estimates: Discloses approximately EUR xx.xx of 2024 sales and separate wound-care/NPWT, bandages/supports and set-system/hygiene activities. It supplies the legacy financial anchor, not a disclosed 2025 wound-segment numerator.
48. Lohmann & Rauscher Group acquired Unisurge International Ltd.
    - Evidence informing base-year company-share estimates: Dates the Unisurge acquisition to March xx.xx 2025 and discloses GBP xx.xx of 2024 turnover from a procedure-pack and OR-product business. That turnover is not inserted wholesale into postoperative dressing revenue.

49. L&R Global - Curapor
    - Evidence informing base-year company-share estimates: Identifies Curapor within the surgical-wound-dressing portfolio, supporting a finished postoperative offering role without establishing its sales weight.
50. Coloplast - Q1 2025/26 Earnings Release
    - Evidence informing base-year company-share estimates: Reports DKK xx.xx of Wound & Tissue Repair revenue and DKK xx.xx of Kerecis revenue for October-December 2025, giving a derived non-Kerecis pool of DKK xx.xx.
    - Evidence informing base-year company-share estimates: The model annualizes this quarter with explicit seasonality and product-return uncertainty; the source does not report the modeled calendar-year numerator.
51. Coloplast - Biatain Alginate
    - Evidence informing base-year company-share estimates: Identifies postoperative surgical wounds among Biatain Alginate applications, supporting commercial category participation but not the assumed postoperative revenue fraction.
52. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026
    - Evidence informing base-year company-share estimates: Provides the 2025 annual-average conversion of USD xx.xx per EUR used for the reported Wound Care revenue.
    - Evidence informing base-year company-share estimates: Provides the 2025 annual-average rate of SEK xx.xx per USD used to convert the modeled attributable revenue.
    - Evidence informing base-year company-share estimates: Provides the 2025 annual-average conversion of USD xx.xx per EUR used for the modeled attributable revenue.
    - Evidence informing base-year company-share estimates: Provides the 2025 annual-average rate of DKK xx.xx per USD used to convert the modeled attributable revenue.
    - Evidence informing base-year company-share estimates: 2025 EUR/USD conversion supports the modeled URGO numerator.
    - Evidence informing base-year company-share estimates: 2025 GBP/USD conversion supports the modeled AMS numerator.
    - Evidence informing base-year company-share estimates: 2025 CNY/USD conversion supports the modeled Winner numerator.
    - Evidence informing base-year company-share estimates: 2025 CNY/USD conversion supports the modeled Zhende numerator.
    - Evidence informing base-year company-share estimates: 2025 CNY/USD conversion supports the modeled Allmed numerator.
    - Evidence informing base-year company-share estimates: 2025 JPY/USD conversion supports the modeled NICHIBAN numerator.
53. Medline Inc. - Form S-1
    - Evidence informing base-year company-share estimates: Reports a USD xx.xx 2024 increase in advanced and essential wound-care products, anchoring the category-specific back-solved revenue model rather than directly establishing total wound sales.
54. Medline Inc. - 2025 Form 10-K
    - Evidence informing base-year company-share estimates: Reports xx.xx% 2025 Front Line Care growth and separates Medline Brand from third-party Supply Chain Solutions, supporting the growth proxy and resale exclusion.
55. Optifoam Gentle Post-Op Silicone/Foam Wound Dressing 4x8 1Ct
    - Evidence informing base-year company-share estimates: Identifies an Optifoam Gentle Post-Op offering and a household-facing cash-purchase route; does not disclose annual postoperative sales.
56. Urgo Medical - Unsere Kennzahlen
    - Evidence informing base-year company-share estimates: Displays EUR xx.xx and an unexplained EUR xx.xx revenue metric. Supports a divisional scale proxy while preserving unresolved period ambiguity.

57. Urgo Medical - UrgoTul Range
    - Evidence informing base-year company-share estimates: Identifies UrgoTul contact-layer and absorbent offerings with postoperative positioning, supporting the qualifying product premise but not its revenue fraction.
58. Advanced Medical Solutions Group plc - Annual Report & Accounts 2025
    - Evidence informing base-year company-share estimates: Reports GBP xx.xx 2025 Infection and Exudate Management revenue and describes partner-branded and bulk-material activity, constraining the selected pool and required exclusions.
59. Foam Dressing - Wound Care Range - ActivHeal Foam
    - Evidence informing base-year company-share estimates: Identifies ActivHeal foam offerings for postoperative surgical wounds, supporting an owned finished-dressing route distinct from customer-owned OEM products.
60. Advanced Medical Solutions - Ways of Working: OEM
    - Evidence informing base-year company-share estimates: Separately describes finished-goods OEM supply, contract manufacturing and co-development, supporting exclusion of upstream customer-owned transfers.
61. 稳健医疗用品股份有限公司 - 2025 年年度报告摘要
    - Evidence informing base-year company-share estimates: Reports approximately CNY xx.xx advanced-dressing revenue, including CNY xx.xx owned-brand revenue, and CNY xx.xx operating-room consumables revenue. These anchor the ownership-sensitive model.
62. Winner Medical - Super Absorbent Dressing
    - Evidence informing base-year company-share estimates: Identifies postoperative applications for Winner's superabsorbent dressing, supporting commercial scope without measuring postoperative sales.
63. 振德医疗用品股份有限公司 - 2025 年年度报告
    - Evidence informing base-year company-share estimates: Provides 2025 basic-care and ostomy/modern-wound-care revenue pools and domestic/export main-business revenue, supporting the category and provisional ownership bridges.
64. Zhende Medical - Non-Woven Island Dressing
    - Evidence informing base-year company-share estimates: Identifies a nonwoven island dressing with surgical-incision applications, establishing a qualifying finished-offering premise rather than sales magnitude.
65. Mölnlycke Health Care and Zhende Medical form pioneering joint venture to expand access to advanced wound care solutions in China
    - Evidence informing base-year company-share estimates: Describes the later China joint venture's sales/distribution role; it is not used to backcast additional 2025 revenue or duplicate partner sales.
66. 奥美医疗用品股份有限公司 - 2025 年年度报告全文
    - Evidence informing base-year company-share estimates: Reports surgical/wound-care and advanced-dressing revenues and a xx.xx% domestic revenue share; confirms Texpol consolidation and identifies imported-brand distribution activity requiring exclusion.
67. Allmed Medical - Nonwoven Island Dressing
    - Evidence informing base-year company-share estimates: Identifies a nonwoven island dressing for surgical incisions, supporting postoperative product scope but not the modeled revenue fractions.
68. NICHIBAN - Financial Results Briefing for the Fiscal Year Ended March 31, 2026
    - Evidence informing base-year company-share estimates: Reports fiscal March 2026 Hospital Products sales of JPY xx.xx and Global sales of JPY xx.xx with comparative changes, supporting reconstructed prior-year inputs and calendarization.
69. NICHIBAN - Financial Results Briefing for the Six Months Ended September 30, 2025
    - Evidence informing base-year company-share estimates: Reports six-month Hospital Products sales of JPY xx.xx, providing a limited independent scale check on the annual calendarization assumption.
70. ニチバン - 術後ケア
    - Evidence informing base-year company-share estimates: Identifies CATHEREEPLUS PAD within postoperative care, supporting the retained product boundary rather than the estimated sales mix.

71. Aroa Biosurgery Limited - Annual Report 2025
    - Evidence informing base-year company-share estimates: Reports FY25 Endoform sales of NZD xx.xx, Myriad sales of NZD xx.xx and Symphony sales of NZD xx.xx; supports product-family calendarization, not direct postoperative attribution.
    - Evidence informing base-year company-share estimates: Describes separate development-fee revenue and consolidated external-sales accounting, supporting exclusions and avoidance of resale double counting.
72. Aroa Biosurgery Limited - H1 FY26 Results, November 25, 2025
    - Evidence informing base-year company-share estimates: For the six months ended September xx.xx 2025, reports Endoform revenue of NZD xx.xx versus xx.xx and Myriad revenue of NZD xx.xx versus xx.xx; these constrain the fiscal-to-calendar bridge.
    - Evidence informing base-year company-share estimates: Shows a dash for current-period Symphony revenue, retained as a disclosure limitation rather than an established zero.
73. Aroa Biosurgery Limited - Annual Report 2026
    - Evidence informing base-year company-share estimates: The annual report states FY26 Myriad revenue of NZD xx.xx, used as the later product-family anchor.
    - Evidence informing base-year company-share estimates: Identifies wholly owned group subsidiaries, elimination of intercompany transactions and revenue recognition on external product transfers; supports consolidated offering-owner attribution.
74. Aroa Biosurgery Limited - FY26 Appendix 4E and Full Year Results, May 26, 2026
    - Evidence informing base-year company-share estimates: The company's May xx.xx 2026 results release reports FY26 Endoform revenue of NZD xx.xx versus xx.xx, providing the subsequent fiscal-year anchor for calendarization.
    - Evidence informing base-year company-share estimates: Its Myriad figure of NZD xx.xx differs slightly from the later annual report; the model uses the later xx.xx disclosure.
75. Federal Reserve Board - Foreign Exchange Rates, G.5A Annual, January 5, 2026
    - Evidence informing base-year company-share estimates: Publishes the 2025 annual-average exchange rate of USD xx.xx per New Zealand dollar, used to convert modeled attributable NZD sales into the frozen denominator's currency.
76. An Economic Evaluation of the Impact, Cost, and Medicare Policy Implications of Chronic Nonhealing Wounds
    - Evidence informing base-year company-share estimates: The primary Medicare analysis reports xx.xx% wound-related prevalence and xx.xx% nonhealing surgical-wound prevalence in 2014. Their ratio is used only as a historical exposure proxy before explicit product-specific adjustments, not as observed AROA purchasing mix.
77. Endoform - AROA
    - Evidence informing base-year company-share estimates: Identifies Endoform Natural and Antimicrobial offerings with surgical and nonsurgical wound applications. Supports qualifying portfolio membership while requiring a postoperative revenue adjustment.
78. AccessGUDID - Myriad Matrix Soft Tissue Bioscaffold, 09421906017670
    - Evidence informing base-year company-share estimates: The official commercial registry identifies Myriad Matrix under both nonimplant wound-matrix dressing and implantable surgical-mesh roles. Supports separating qualifying dressing activity from excluded implant activity, but does not measure either revenue fraction.
79. FDA 510(k) Premarket Notification - Symphony, K200413
    - Evidence informing base-year company-share estimates: FDA record K200413 identifies AROA's Symphony as an animal-derived wound dressing, supporting commercial category membership rather than sales volume or postoperative penetration.
80. Reimbursement - Aroa Biosurgery
    - Evidence informing base-year company-share estimates: Provides Endoform-specific coding assistance while retaining provider responsibility and disclaiming guaranteed payer coverage. Supports conditional-access assumptions, not a numerical sales uplift.

81. Mölnlycke and AROA Partner to Expand Access to Endoform in the US
    - Evidence informing base-year company-share estimates: States that US post-acute Endoform co-promotion takes effect October xx.xx 2026, with AROA retaining ownership, manufacturing, distribution and supply. Supports ownership attribution and exclusion of a retrospective 2025 partnership uplift.

19.2. Market Concentration Analysis, 2025

Commercial control rests partly with the purchasing arrangement rather than solely with the product owner. The NHS advanced-wound-care framework permits switching and supplier commitments, while its NPWT framework separates consumable ordering from equipment arrangements. ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪

Finished-goods partnerships provide an entry route without requiring the entrant to own the supplying manufacturer. ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ A general partnership capability does not establish availability or exclusivity for a particular postoperative product.

Several company identities do not represent independent alternative supply chains. Allmed Medical records its acquisition of Texpol, associated with Textil Planas Oliveras S.A.; CareNow Medical Pvt Ltd identifies itself as part of Healthium Medtech Limited. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪

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Technology participation does not necessarily confer finished-dressing control. ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪

[redacted] Buyers should confirm that their distributor has access to the exact offering; prospective partners need offering-specific rights rather than a general wound-care mandate.

Nipro and LIBATAPE PHARMACEUTICAL CO., LTD. illustrate a further limit to generic OEM assumptions. Libatape identifies Nipro as a co-development partner for named Surgit products and states that those jointly developed products are not available for general OEM supply. [redacted]

Local representation can establish regulatory accountability without establishing distribution power. Nigeria's Pharmapore record distinguishes Pharmaplast S.A.[redacted]

Direct selling and partner commercialization allocate control differently. Covalon Technologies Ltd. documents both direct hospital access and partner models, and its fiscal 2026 first-quarter discussion identifies disruption associated with an advanced-wound-care partner's ownership transition. [redacted]

Medela-related names require particular care. [redacted] A new account or seller identity is not, by itself, an independent alternative source.

Sources & Evidence

1. Advanced Wound Care
   - The framework permits product switching and supplier commitments.
2. Ways of Working - OEM
   - AMS advertises finished-goods, contract-manufacturing, and co-development OEM models.

3. Pharmapore Sterile Adhesive Nonwoven Dressing - NAFDAC Greenbook
   - NAFDAC distinguishes Pharmaplast as manufacturer and Excellent Port Company Limited as applicant for the named Pharmapore dressing. ([greenbook.nafdac.gov.ng](https://greenbook.nafdac.gov.ng/products/details/xx.xx))
4. Covalon Technologies Ltd. - MD&A Q1 F-2026
   - The filing describes direct and partner commercialization and an advanced-wound-care partner ownership-transition disruption, without postoperative-specific attribution.
5. Film Post-Operative Dressing - Jamjoom Medical Industries | Jamjoom Medical Solutions
   - Jamjoom advertises Jeddah manufacture and direct Saudi hospital supply for Film Post-Operative Dressing.
6. Negative Pressure Wound Therapy
   - Consumable ordering and equipment arrangements are separated.
7. Servizi
   - Eurosirel describes an integrated private-label manufacturing and commercialization service.
8. Wound Hydrogel - OEM/ODM Supplier
   - Hannox advertises HX-WH22 Wound Hydrogel for postoperative wounds through an OEM/ODM proposition.
9. Our History - Allmed Medical
   - Allmed's corporate history records its Texpol acquisition, supporting a related-business distinction.
10. About Us - CareNow Medical
    - CareNow identifies itself as part of Healthium Medtech Limited.
11. FAQ - DermaRite Medical
    - DermaRite identifies SionBrands as the US platform of the Sion Medical-Degasa Group.
12. BeneHold CHG Antimicrobial Adhesive Technology
    - Avery Dennison's BeneHold CHG brochure identifies postoperative applications and references ReliaTect and Eloquest trademarks associated with Ferndale IP.
13. SKU & Distributor Information
    - Eloquest states that ReliaTect Post-Op is available through limited distributors.
14. Medaxis NPWT Customer Transition Communication
    - Medaxis describes the Medela wound-care transition and states that the companies share parent ownership.
15. 技術事例「10μm テープ：サージット」
    - Libatape identifies Nipro as a co-development partner for named Surgit products and states that those products are not generally available for OEM supply.
16. Nossas Marcas - Viveo
    - The brand relationship does not identify every product's accountable operating supplier.
17. Mediplast Transparency Act Due-Diligence Report
    - Mediplast's due-diligence disclosure identifies AddLife ownership and a Nordic medical-supply role.

19.3. Recent Developments & Impact Analysis, 2025

Commercial partnerships can expand account access without transferring product ownership. Mölnlycke Health Care announced an exclusive US post-acute Endoform co-promotion agreement effective October xx.xx 2026. ■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■

China localization is advancing through a shared commercial organization rather than an announced acquisition of the partners' entire portfolios. The May xx.xx 2026 Mölnlycke-Zhende

Medical announcement describes a majority-Mölnlycke-owned venture initially focused on sales and distribution. ▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪

Acquisitions have changed the relationship between regional brands and channels. ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ Contracting responsibility and continuity of the selected product remain the practical buyer checks.

▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Buyers can now direct listing and delivery discussions to a named intermediary, but exclusivity, institutional acceptance, and continuing fulfillment are not established by the announcement. The relationship should not be projected backward into the 2025 purchasing environment.

Offering-level supply restrictions can outweigh broad portfolio participation. FDA's March xx.xx 2026 update classified the identified Integra LifeSciences Holdings Corporation MediHoney and CVS wound-product action as a Class II recall. ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪

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Sources & Evidence

1. Safe N Simple LLC and Advamedica Announce Nationwide Distribution Partnership for MaxioCel in the United States
   · The announcement body dated April xx.xx 2026 names Safe N Simple as Advamedica's nationwide US distribution partner; it does not establish exclusivity or realized fulfillment.
2. Negative Pressure Wound Therapy
   · The framework records Medela UK Ltd as delisted after exiting that market.
3. FAQ - DermaRite Medical
   · DermaRite states that it joined the group in 2025.
4. Medaxis NPWT Customer Transition Communication
   · The August xx.xx 2024 customer letter describes NPWT ordering and renewal changes from November xx.xx 2024.
5. Mölnlycke and AROA Partner to Expand Access to Endoform in the US
   · The exclusive US post-acute co-promotion agreement is effective October xx.xx 2026; AROA retains Endoform ownership and manufacture, distribution, and supply. ([molnlycke.com](https://www.molnlycke.com/en-my/news/molnlycke-news/news---molnlycke-and-aroa-partner-to-expand-access-to-endoformtm-in-the-us/))
6. Mölnlycke Health Care and Zhende Medical Form a Joint Venture in China
   · The May xx.xx 2026 announcement describes a majority-Mölnlycke-owned China venture initially focused on sales and distribution. ([molnlycke.com](https://www.molnlycke.com/en-my/news/media-room/press-release-molnlycke-health-care-and-zhende-medical-form-pioneering-joint-venture-to-expand-access-to-advanced-wound-care-solutions-in-china/))
7. Martin Ma Joins Mölnlycke Zhende as General Manager
   · The October xx.xx 2026 announcement identifies the venture's general manager and commercial-execution responsibilities, not product-level rollout. ([molnlycke.com](https://www.molnlycke.com/en-my/news/molnlycke-news/news-martin-ma-joins-molnlycke-zhende-as-general-manager/))
8. Casex Agora é Gentell
   · Gentell states that it completed the Casex acquisition on June xx.xx 2025, including products, personnel, and manufacturing assets in Brazil and Paraguay.
9. CFAO Healthcare Acquires Goodlife Pharmacy
   · CFAO Healthcare announced full ownership of Goodlife Pharmacy on July xx.xx 2025.
10. Wound and Burn Dressing Recall: Integra LifeSciences Removes Certain MediHoney and CVS Products
    · FDA's March xx.xx 2026 update classifies the identified MediHoney and CVS action as a Class II recall and does not establish resumed supply. ([fda.gov](https://www.fda.gov/medical-devices/medical-device-recalls-and-early-alerts/wound-and-burn-dressing-recall-integra-lifesciences-removes-certain-medihoney-and-cvs-wound-and-burn))
11. Rebranding from 3M to Solventum
    · Solventum schedules dressing-family rebranding and states that product designs and catalog numbers remain unchanged.

19.4. Product Portfolio Analysis, 2025

Post-Operative Wound Dressings compete through finished offerings with different purchasing roles, rather than through material categories alone. PAUL HARTMANN AG's Cosmopor Steril and Lohmann & Rauscher's Curapor provide conventional absorbent surgical-cover alternatives. ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■ ■ ■■■■■■■■■■■■■■■■

[redacted]

Absorbent dressings and contact-layer portfolios create a separate comparison. B. Braun SE advertises Askina DresSil Active for surgical wounds; Coloplast identifies postoperative applications for Biatain Alginate; and URGO Medical's UrgoTul range includes contact-layer and absorbent formats. [redacted]

Antimicrobial-related portfolios are commercially differentiated but should not form an unsupported performance hierarchy. Bravida Medical advertises Silverlon Surgical Island Dressings; Covalon Technologies Ltd. identifies SurgiClear and MediClear Post-Op Absorb; MedCu Technologies offers copper-based adhesive and nonadhesive dressings; and Dynamic Techno Medicals Pvt. [redacted]

Specialty wound-management products broaden the portfolio beyond routine adhesive incision covers. Human BioSciences, Inc. advertises ColleCule LpH Collagen Pad for surgical wounds with a professional prescription condition. [redacted]

China- and India-linked suppliers add relevant finished-dressing alternatives without establishing unrestricted destination access. Allmed Medical and Zhende Medical advertise nonwoven island dressings for surgical incisions. [redacted]

Japanese portfolios illustrate the difference between a postoperative range and a general surgical-pad assortment. ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ These distinctions favor product-level qualification over assuming that a Japanese supplier's broader medical portfolio establishes equivalent postoperative coverage.

European conventional-cover alternatives include ZARYS International sp. z o.o.'s elastopor STERIL, Plastod S.p.▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪

Turkey-linked offerings also require format-specific comparison. ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ This creates a practical distinction between explicitly positioned postoperative alternatives and broader surgical-cover candidates, without implying that the latter lack a relevant commercial role.

Brazilian portfolio choices include Polar Fix's postoperative transparent-film offering, Missner & Missner Ltda.'s M-TEC incision-protection dressings, and Vuelo Pharma's Membracel cellulose membrane. ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ Laboratorio Celina must remain a distinct identity from Vuelo Pharma; a similar product name does not establish affiliation, common rights, or product equivalence.

Ophthalmic Surgery requires its own peer group within the accepted market. ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Neither specialty covering should be benchmarked as if it were a general cutaneous incision-dressing portfolio.

[redacted] The same distinction between a documented dressing family and a qualified postoperative offer applies to legacy portfolios. Portfolio breadth is useful for sourcing discussions, but not sufficient to establish that every historical configuration remains an accessible alternative.

Topical Oxygen Therapy and Bioelectric Wound Therapy remain within the accepted platform scope. Mölnlycke Health Care's topical-oxygen portfolio identifies Granulox in a chronic-wound context; that page does not establish a postoperative alternative for a particular buyer. [redacted]

Sources & Evidence

1. AQUACEL SURGICAL cover dressing
   - Convatec presents AQUACEL SURGICAL as an integrated postoperative cover combining several dressing attributes.
2. MedCu - Advanced Copper-Based Wound Dressings
   - MedCu advertises copper-based adhesive and nonadhesive dressings with surgical-wound applications.
3. Covalon Technologies Ltd. - MD&A Q1 F-2026
   - Covalon's filing identifies SurgiClear and MediClear Post-Op Absorb.
4. Safe N Simple LLC and Advamedica Announce Nationwide Distribution Partnership for MaxioCel in the United States
   - The announcement identifies MaxioCel as a chitosan gelling-fiber dressing with surgical-wound applications.
5. Membracel - Vuelo Pharma
   - Vuelo identifies Membracel as a cellulose membrane with surgical-wound applications; this does not establish affiliation with a similarly named product.
6. OPTIPAD - Médicale Gaze
   - Médicale Gaze distinguishes adult OPTIPAD postoperative protection and absorption from pediatric orthoptic occlusion.
7. ドレッシング材｜商品情報（医療関係者向け）
   - ALCARE's Japanese catalog lists KARAYAHESIVE, SILKYPORE DRESSING, and MULTI FIX-PAD.
8. Endoform | AROA
   - AROA identifies Endoform restorative bioscaffolds for specified surgical applications and qualifies country availability.
9. Cosmopor Steril
   - HARTMANN advertises Cosmopor Steril for postsurgical wounds and incision sites.
10. Curapor
    - Lohmann & Rauscher advertises Curapor surgical dressings with postoperative applications.
11. Askina DresSil Active
    - B. Braun advertises Askina DresSil Active for surgical wounds.
12. Biatain Alginate
    - Coloplast identifies postoperative surgical wounds among Biatain Alginate applications.

13. UrgoTul Range
    - URGO's UrgoTul range includes contact-layer and absorbent formats with postoperative positioning.
14. Covaderm GTL Silicone Composite Wound Dressing
    - DeRoyal advertises Covaderm GTL silicone composite dressings with incision applications.
15. Super Absorbent Dressing
    - Winner Medical advertises postoperative applications for superabsorbent dressings.
16. Silverlon Surgical Island Dressing
    - Bravida advertises Silverlon Surgical Island Dressings and qualifies country availability.
17. Sterizone ST Antimicrobial Silver Wound Dressing
    - Dynamic Techno Medicals advertises Sterizone ST silver dressings with postoperative applications.
18. Xeroform Petrolatum Gauze Dressing
    - Safe N Simple markets Simpurity Xeroform gauze with surgical-wound applications.
19. Collagen Wound Care Products
    - Human BioSciences advertises ColleCule LpH Collagen Pad for surgical wounds and identifies a professional prescription condition.
20. About Us - PolyMem Dressings
    - Ferris identifies itself as the producer and distributor behind PolyMem.
21. Nonwoven Island Dressing
    - Allmed advertises a Nonwoven Island Dressing for surgical incisions.
22. Non-Woven Island Dressing - Zhende Medical
    - Zhende advertises a nonwoven island dressing with surgical-incision applications.
23. Silicone Postoperative Dressing
    - Foryou identifies its silicone postoperative dressing.
24. Velfix T+Pad
    - Datt offers Velfix T+Pad as a postoperative film-and-pad dressing.
25. 術後ケア
    - Nichiban's postoperative-care portfolio identifies CATHEREEPLUS PAD.
26. 術後創
    - Nitoms' postoperative catalog supplies a named dressing lead; parent, seller, and manufacturing roles require separate matching.
27. オーゼ CP
    - Osaki advertises Oze CP surgical pads; this record does not settle the proposed postoperative purchasing application.
28. Dressings - ZARYS
    - ZARYS advertises elastopor STERIL for postoperative wounds.
29. Wound Dressing - Plastod
    - Plastod advertises film dressings for surgical sites.
30. Pflaster - DRACO
    - DRACO's plaster portfolio includes postoperative positioning.
31. MaiMed porefix steril
    - MaiMed advertises porefix steril as a postoperative dressing.
32. Wound Care Products for Clinical Environments and Home Care
    - ABENA advertises postoperative dressings, including waterproof and film versions.
33. Plasters - Tosama
    - Tosama advertises plasters for surgical wounds.
34. Post Operatori - Presteril
    - Corman's Presteril postoperative category offers several named dressing families.

35. Хірургічні пов'язки торгової марки IGAR
    - IGAR advertises transparent surgical dressings with absorbent pads.
36. Nasze Rozwiązania - Matopat
    - Matopat's materials identify Fixopore postoperative dressings.
37. OctaCare Non-Woven Wound Dressings
    - Octamed positions OctaCare nonwoven dressings for postoperative sutured wounds.
38. Our Products - Seyitler Kimya
    - Seyitler advertises Maxipore Dress and Maxipore PU Dress for postoperative wounds.
39. Wound Care Series
    - LifeCare advertises nonwoven and transparent dressings for postoperative protection.
40. Betapad Adhesive Surgical Dressing
    - Betasan advertises Betapad as a complete adhesive surgical dressing.
41. Topical Oxygen Therapy
    - Mölnlycke identifies Granulox within topical oxygen therapy in a chronic-wound context, not as a settled postoperative purchasing alternative.
42. Multi-Layered Wound Dressing
    - MPM advertises a multilayer wound dressing with surgical-wound applications.
43. AMERX Bordered Gauze Dressing
    - AMERX separately offers a bordered-gauze dressing.
44. Restore Calcium Alginate Dressing
    - Hollister maintains a Restore Calcium Alginate listing; the listing alone does not settle current postoperative application continuity.
45. Produtos - Polar Fix
    - Polar Fix's portfolio lists a postoperative transparent-film dressing.
46. Linha Curativos Avançados - Missner
    - Missner's M-TEC portfolio includes protection of surgical incisions.
47. Nossas Marcas - Viveo
    - Viveo identifies Cremer within its brand portfolio.

19.5. Benchmarking Analysis, 2025

A useful benchmark begins with the buyer's requirement: the same surgical application, finished configuration, jurisdiction, accepted purchasing route, and continuity obligation. ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■ Suppliers should therefore be compared within defensible peer groups-conventional incision covers, differentiated absorbent covers, specialist matrices or membranes, and therapy-linked arrangements-before broader portfolio or channel capabilities are considered.

Application-specific comparative evidence can support narrower purchasing criteria than a brand-wide superiority claim. The published open-label hip- and knee-replacement comparison of Mepilex Border Post-Op and Aquacel Surgical reported low dressing failure with both, alongside handling and patient-experience differences favoring Mepilex. ■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■ ■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■

[illegible] L., direct entity-to-offering responsibility also requires confirmation. Buyers should resolve the legal seller, brand owner, and product identity before relying on these routes as substitutes; a familiar product description cannot cure an ambiguous counterparty.

Broader wound-care portfolios should not be scored as if every product were a confirmed postoperative alternative. [illegible] Each needs a product-specific application and supply match before conversion.

The same distinction affects Farmac-Zabban S.p.A., Eurosirel, Evercare Medical, Laboratoires Euromedis, and Gaspunt, S.A. [illegible]

Retail and abbreviated identities require a different benchmark from manufacturing suppliers. Todo Medica, Farmacias Julios, ALMAR SRL, JMS S.A. [illegible]

Gulf portfolios differ in how far they identify an actionable purchasing alternative. Saudi Mais Co., SAS MED, and Aumet For Pharmaceuticals & Medical Disposables Co. advertise relevant wound-care categories or divisions; Alfarsi Medical Supplies and PolyMed describe surgical or medical disposables. [illegible]

[illegible] Al Essa Med, Al Mutawa Ph, and Green Heart Pharmacy require an exact postoperative product match rather than inference from store presence or a broader wound-care listing. Turuq Al_Tashkis Company identifies advanced wound care as a business area, but an offering-specific mandate remains unresolved.

[illegible] Arsin Salamat Iranian advertises a postsurgical Lomatuell Pro route, but current local rights and fulfillment require separate confirmation. These conclusions preserve the distinction between a plausible commercial lead and an accountable purchasing commitment.

[illegible] Regino Medicals Limited, Sterifil, and ULTIMED retain unresolved named-offering and supplier-responsibility questions. These distinctions matter when deciding which counterparty can undertake the required institutional or household supply obligation.

Asian supplier benchmarks should separate product evidence from a general regional footprint. Genewel Co., Ltd.'s Medifoam-related regional agreements do not themselves establish a particular postoperative product's local access. [illegible]

Cotton Craft (Pvt.) [illegible]

[redacted] Manarti Exports requires the same product-to-entity confirmation and a destination supply commitment; country-targeted promotion alone should not be interpreted as local presence.

Several specialist identities need clarification of the finished offering rather than investigation of technical methods. [redacted] Bastos Viegas, S.A. needs a current qualifying finished offering and supply-party match.

At group and legacy-brand level, Milliken & Company's comparison requires confirmation of the entity supplying the OVIK-advertised surgical-wound foam range. Mediq's Klinion postoperative portfolio needs an exact local brand-to-contract relationship. [redacted]

Sources & Evidence

1. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement...
   · The open-label arthroplasty comparison reports low dressing failure for both products and handling and experience differences favoring Mepilex within that study. ([biblio.ugent.be](https://biblio.ugent.be/publication/xx.xx))
2. Advanced Wound Care
   · Framework participation provides an institutional comparison boundary, not universal product interchangeability.
3. Leukomed Sorbact for preventing surgical site infection - Information for the public
   · NICE's Leukomed Sorbact public guidance concerns specified caesarean-section and vascular-surgery wounds. ([nice.org.uk](https://www.nice.org.uk/guidance/htg567/informationforpublic))
4. Essential Products for Ambulatory Surgery Centers
   · The assortment establishes a surgery-center supply role, not a universal postoperative product match.
5. Island Dressings - Sterile
   · The named complete-dressing listing does not itself settle the proposed postoperative purchasing application.
6. Servizi
   · The services page establishes a business model rather than a named current postoperative offering.

7. Four Main Types of Wound Dressings
   - OVIK advertises ULTRA foam-family products with surgical-wound applications; the product presentation alone does not settle parent-to-supplier rights.
8. Non-Woven Yara Pedi
   - Cansın maintains a nonwoven wound-pad listing; the proposed postoperative application requires confirmation.
9. ALPHETA Catalog
   - Honnes hosts an older ALPHETA dressing catalog, which does not independently settle continuing postoperative availability.
10. Advazorb - Advancis Medical
    - Advancis advertises Advazorb foam dressings; the proposed postoperative configuration requires separate matching.
11. Clearpore - Transparent Film Dressing with Pad
    - Clearpore is an identified postoperative film-and-pad offering; the page combines Richardson Limited and Inc. references.
12. ActivHeal Silicone Foam Adhesive Border Dressing - MedHub
    - MedHub's ActivHeal product listing contains a conflicting Mölnlycke brand attribution.
13. Transparent Film with Island Dressing - Wynnmed
    - Wynnmed advertises a postoperative film-island dressing; the product page does not settle all legal-operator and brand responsibilities.
14. Products and Services - Batist Medical
    - Batist lists ELASTPORE+PAD within its portfolio; an exact postoperative purchasing application remains to be matched.
15. Our Product Portfolio - Medicareplus
    - Medicareplus offers dressings and dressing packs; broad portfolio presence does not settle the named postoperative product.
16. Tapes & Wound Dressings - MEDISEI
    - MEDISEI lists pad-and-adhesive dressing products; the proposed postoperative application requires confirmation.
17. Contact - Evercare Medical
    - Evercare identifies a Surgery, Wound & Hospital Care business unit; this does not identify a named postoperative dressing.
18. Apósitos Tejido Sin Tejer
    - Gaspunt's nonwoven-dressing category does not provide an individual postoperative product match.
19. Apósitos - Laboratorios Emetex
    - Emetex advertises complete dressing products; the exact postoperative application and contracting entity require matching.
20. Products - Saudi Mais
    - Saudi Mais advertises wound-care categories, including transparent and honey dressings.
21. Business - SAS MED
    - SAS MED advertises wound-dressing inventory categories without settling the exact postoperative offer.
22. Disinfection & Wound-care Division
    - Aumet identifies a dedicated disinfection and wound-care division.
23. Surgical Consumables - Alfarsi Medical Supplies
    - Alfarsi advertises surgical dressings within its consumables portfolio.
24. Medical Disposables - PolyMed
    - PolyMed's Oman-facing page advertises medical-disposable and dressing categories.
25. About Us - Elite-Ag
    - Elite-Ag describes an advanced-dressing manufacturing and supply business.

26. Advanced Wound Care - Nhara
    - Nhara advertises advanced-wound-care categories addressing post-surgical wounds.
27. Partners - AMAD Gulf Industrial
    - AMAD advertises selected private-label, distribution, and institutional supply partnerships.
28. Turuq Al_Tashkis Company
    - Turuq Al-Tashkis identifies advanced wound care as a business area without establishing an offering-specific mandate.
29. TrueTrip Adhesive Wound Dressing
    - Green Heart Pharmacy lists a TrueTrip adhesive wound dressing; an exact postoperative match remains necessary.
30. CurALL
    - CurALL advertises AQUABLOCK as a postoperative dressing; the catalog does not settle its responsible legal operator.
31. SOCIETE PARA PHARMA PROMOTION
    - SOCIETE PARA PHARMA PROMOTION describes relevant dressing and platform activities without a settled named postoperative offer.
32. Adhesive Bandage Products - SOCOTHYD
    - SOCOTHYD lists adhesive-product categories rather than identifying the complete postoperative product for the proposed purchase.
33. Wound Dressing - Medic
    - Medic's catalog lists Post Operative Wound Dressing; the page does not resolve all legal and product-responsibility mapping.
34. Hospital Consumables - Agary Pharmaceutical
    - Agary lists a tulle dressing; a postoperative application match remains separate.
35. Company History - Genewel
    - Genewel records Medifoam-related regional agreements, which do not themselves establish a particular postoperative product's local access.
36. About Us - MediPurpose
    - MediPurpose describes its MediPlus advanced-wound-care portfolio without confirming every historical postoperative SKU's continuing availability.
37. Wound Care Products and Wound Management Solutions - Klinion
    - Klinion advertises postoperative border plasters; local brand-to-contract responsibility requires separate matching.

20. Company Profiles

20.1. Solventum Corporation

Solventum offers a postoperative platform relationship rather than only a disposable dressing. [illegible] rental terms should not be assumed to govern every Prevena configuration.

[illegible] A coordinated relationship provides an identified support route but retains administrative dependencies and payer-specific conditions. Equivalent arrangements outside the United States require separate confirmation.

Sources & Evidence

1. Medical support
   - Solventum advertises round-the-clock US V.A.C. support and directs patients to telephone and app-based supply-ordering assistance.
2. V.A.C. Therapy patient support
   - Solventum's US patient page identifies Prevena for incision management and describes ActiV.A.C. rental, replenishment, and return arrangements.
   - The page states that missing provider documentation can prevent insurance billing and result in equipment collection or personal payment responsibility.
3. Negative Pressure Wound Therapy - Medicare Provider Compliance Tips
   - CMS's NPWT compliance example describes payment recoupment following insufficient documentation. The example concerns a diabetic-foot-ulcer claim, not proof of postoperative eligibility.
4. April 4, 2024 - 8-K: Current report
   - Company verification: The filing identifies Solventum Corporation and establishes its separation from 3M effective April xx.xx 2024.
5. Advanced wound care and skin care solutions
   - Company verification: The Solventum-hosted wound-care catalog includes Tegaderm dressings with closed surgical-incision positioning.
6. Rebranding from 3M to Solventum | Solventum
   - Company verification: Solventum's current rebranding notice identifies Tegaderm and Medipore dressing families in its Q3 2026 transition schedule and states that product designs and catalog numbers remain unchanged. This refreshes portfolio-continuity evidence without establishing inventory or sales. ([solventum.com](https://www.solventum.com/en-us/home/medical/support/rebranding-from-3m-to-solventum/))

20.2. Smith+Nephew

Smith+Nephew supplies both standard incision coverings and single-use NPWT. OPSITE POST-OP is presented as a postoperative film dressing with an absorbent pad for closed surgical incisions; PICO xx.xx is presented as a single-use NPWT system for open wounds and closed surgical incisions. ■■■■ ■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■

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Sources & Evidence

1. Negative Pressure Wound Therapy
   - The NHS NPWT framework names Smith & Nephew among suppliers.
   - Consumables use catalog routes, while equipment access includes directly arranged purchase, rental, and free-on-loan relationships; the summary does not assign identical terms to every supplier offering.
2. OPSITE POST-OP Transparent Waterproof Dressings
   - Smith+Nephew presents OPSITE POST-OP as a postoperative film dressing with an absorbent pad for closed surgical incisions.
   - The page cautions that not all products or indications are licensed in every country.
3. PICO 7 Single Use Negative Pressure Wound Therapy System
   - Smith+Nephew presents PICO xx.xx as a single-use NPWT system for open wounds and closed surgical incisions, establishing a distinct platform alongside its standard postoperative dressing.
4. Advanced Wound Care
   - Company verification: Named advanced wound-care framework supplier.
5. OPSITE POST OP | Smith+Nephew Global
   - Company verification: Smith+Nephew markets OPSITE POST-OP transparent waterproof dressings for postoperative incision protection.

20.3. Mölnlycke Health Care

Mölnlycke offers Mepilex Border Post-Op as an incision-dressing proposition that can be assessed on handling and patient experience, not only complication outcomes. ■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■ ■■■■ ■■■■■■■■■ Arthroplasty purchasers can include these criteria in selection, but should not interpret the comparison as universal clinical superiority or automatically transfer it to other surgical applications.

Mölnlycke's sustainability frameworks have different comparison boundaries. Its stated product-LCA comparison policy uses its own portfolio average rather than competitors; its separate portfolio sustainability assessment considers mainstream alternatives. ■■■■■■■

[redacted]

Sources & Evidence

1. A prospective randomized controlled clinical investigation comparing two post-operative wound dressings used after elective hip and knee replacement...
   - The published 2020 open-label hip- and knee-replacement comparison reported low dressing failure with both Mepilex Border Post-Op and Aquacel Surgical, with several handling and patient-experience measures favoring Mepilex.
2. Sustainable portfolios
   - Mölnlycke identifies Mepilex Border Post-Op as a postoperative offering.
   - Its stated product-LCA comparison policy uses its own portfolio average rather than competitors, while its separate Sustainable Product Portfolio Assessment considers mainstream market alternatives.
3. Advanced Wound Care
   - Company verification: Named advanced wound-care framework supplier.
4. Mepilex Border Post-Op
   - Company verification: Mölnlycke offers Mepilex Border Post-Op as a self-adherent absorbent surgical dressing and provides procurement information.
5. Mölnlycke Health Care and Zhende Medical form pioneering joint venture to expand access to advanced wound care solutions in China
   - Company verification: A May xx.xx 2026 company announcement describes a China joint venture with Zhende Medical, majority owned by Mölnlycke.
   - Company verification: The announced initial role is sales and distribution of the partners' advanced-wound-care products.
   - Company verification: The announcement expected operations during Q3 2026; it does not establish realized product sales.

20.4. Convatec

Convatec provides AQUACEL SURGICAL as a finished surgical-cover offering, not merely a source of gelling fiber. Its UK portfolio describes a single-product postoperative solution combining Hydrofiber, hydrocolloid, and film attributes. [redacted] Purchasers and distributors should match the exact standard or Ag product and local supplying party before extending a portfolio selection across jurisdictions. An integrated cover consolidates the product decision but retains variant- and country-specific access requirements.

Sources & Evidence

1. AQUACEL SURGICAL cover dressing
   - Convatec's UK portfolio presents AQUACEL SURGICAL as a single-product postoperative incision-management offering combining Hydrofiber, hydrocolloid, and film attributes.
   - Company verification: Convatec offers AQUACEL SURGICAL cover dressings for postoperative management of surgical incisions.
2. Convatec Australia Pty Ltd - AQUACEL Ag Surgical Cover Dressing - Dressing, hydrophilic gel-forming (216814)
   - The Australian ARTG record identifies AQUACEL Ag Surgical Cover Dressing, Convatec Australia Pty Ltd as sponsor, and Convatec Limited as manufacturer. It concerns the named Ag offering rather than the complete AQUACEL portfolio.
3. Advanced Wound Care
   - Company verification: Named advanced wound-care framework supplier.

20.5. Essity

[redacted] NHS Supply Chain separately names Essity T/A BSN Medical Ltd on its advanced-wound-care framework. These records establish a named offering and institutional contracting identity, not automatic acceptance of every configuration or superiority to silver-based products.

NICE's published public guidance identifies Leukomed Sorbact as an NHS option for caesarean-section and vascular-surgery wounds within its stated wound criteria. [redacted] The benefit is a distinct microbial-binding purchasing option; the limitation is that broader portfolio positioning does not itself extend the scope of application-specific evidence.

Sources & Evidence

1. Advanced Wound Care
   - NHS Supply Chain names Essity T/A BSN Medical Ltd among advanced-wound-care framework suppliers, corroborating the institutional contracting identity without establishing every product configuration's acceptance.
   - Company verification: Listed as Essity trading through BSN Medical.
2. Leukomed Sorbact - bacteria- and fungi-binding surgical dressing
   - Essity's Leukoplast portfolio lists Leukomed Sorbact as a bacteria- and fungi-binding surgical dressing with postoperative positioning.
   - The product page supplies commercial order references and NHS Supply Chain codes and identifies Leukoplast as an Essity brand.
3. Respond to the rise of surgical site infections and AMR with Leukomed Sorbact
   - Essity identifies Leukomed Sorbact with DACC technology and presents a physical microbial-binding proposition without release of active substances. This establishes the company's commercial positioning, not independent comparative superiority.

4. Leukomed Sorbact for preventing surgical site infection - Information for the public
   - NICE's public guidance identifies Leukomed Sorbact as an NHS option for caesarean-section and vascular-surgery wounds within its stated wound criteria. The guidance is application-specific rather than an all-surgery recommendation.
5. Leukomed
   - Company verification: Essity's Australian portfolio offers Leukomed sterile absorbent dressings following surgical intervention.

20.6. Medline Inc.

Medline Inc. combines an own-brand product business with distribution relationships through its subsidiaries. Its filing distinguishes Medline Brand from Supply Chain Solutions, which supplies third-party products, and explains that Medline Inc. controls the business through Medline Holdings. ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■ ■ ■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■ ■■■■■■■■■■■■■■ ■■■■■■■■■■

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Providers can identify the household route as an option after confirming the required SKU, delivery availability, and who pays. ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■ ■■■ ■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■ Channel convenience must be weighed against personal payment responsibility and product-specific fulfillment; a portfolio listing does not establish continuing availability through every retail outlet.

Sources & Evidence

1. Consumer - Medline
   - Medline describes consumer access through retail stores, online channels, and Medline at Home. This is channel-level information, not confirmation that a particular postoperative SKU is supplied by every outlet.
2. Optifoam Gentle Post-Op Foam Wound Dressings
   - Medline's catalog identifies Optifoam Gentle Post-Op Foam Wound Dressings and names MEDLINE as manufacturer. The designation does not identify the ownership of every production facility.
   - Company verification: Medline's catalog identifies Medline as manufacturer of Optifoam Gentle Post-Op Foam Wound Dressings.
3. Optifoam Gentle Silicone-Faced Post-Op Foam Wound Dressing
   - Medline at Home lists an Optifoam Gentle Post-Op offering for household-facing purchase.
   - The storefront states that it conducts cash sales, does not submit insurance claims, and does not verify Medicare coverage; the customer accepts payment responsibility.
   - Company verification: Medline's home-care storefront offers Optifoam Gentle Post-Op dressings explicitly for postoperative wound care.

4. Medline Inc. - 2025 Form 10-K
   - Medline Inc.'s 2025 Form xx.xx-K explains its control of the business through Medline Holdings and subsidiaries.
   - The filing distinguishes Medline Brand from Supply Chain Solutions and describes both owned manufacturing and third-party sourcing, supporting separation of brand identity, distribution, and facility ownership.
5. Advanced Wound Care
   - Company verification: Medline Industries is a listed supplier.
6. Medline Reports Fourth Quarter and Full Year 2025 Results
   - Company verification: The February xx.xx 2026 corporate release identifies Medline Inc. and reports completion of its initial public offering.

20.7. Advanced Medical Solutions Group plc

[redacted] NHS Supply Chain independently names Advanced Medical Solutions Ltd as an advanced-wound-care framework supplier. This supports an identified branded offering and institutional route without establishing that a future OEM customer's version inherits the same listing.

[redacted] A portfolio owner can compare an agreed finished-goods arrangement with purchasing an existing ActivHeal offering. Co-development represents a different rights and commitment decision, not an established requirement for obtaining every existing product.

Before choosing an own-label route, the customer should confirm the contracting entity, postoperative product availability, territorial rights, applicable authorization, customer acceptance, and delivery obligations. [redacted] Public capability descriptions do not settle partner-specific availability or exclusivity.

Sources & Evidence

1. Advanced Wound Care
   - NHS Supply Chain names Advanced Medical Solutions Ltd as an advanced-wound-care framework supplier. The framework relationship does not itself establish access for a future OEM customer's version.
   - Company verification: Advanced Medical Solutions Ltd is listed.
2. Ways of Working - OEM
   - Advanced Medical Solutions advertises finished-goods supply, contract manufacturing, and co-development OEM models.
   - The company identifies portfolio-gap filling and second-source supply among reasons for OEM relationships; the page does not establish partner-specific postoperative availability or exclusivity.

3. Foam Dressing - Wound Care Range - ActivHeal Foam
   - ActivHeal Foam Adhesive and Foam Non-Adhesive include postoperative surgical wounds in their portfolio positioning and provide UK purchasing references.
   - The page identifies ActivHeal trademarks with Advanced Medical Solutions Ltd and links the offering to the AMS group.
   - Company verification: The ActivHeal portfolio offers foam dressings explicitly positioned for postoperative surgical wounds.
4. Establishment Registration & Device Listing
   - Company verification: The FDA device listing names ActivHeal Surgical Ag and Primaseal Post Op AG+, identifies Advanced Medical Solutions Ltd, and names Advanced Medical Solutions Group PLC as owner/operator.
   - Company verification: This is establishment and product-listing evidence, not proof of approval or sales.

20.8. Pharmaplast S.A.E.

Pharmaplast S.A.■■ ■■■ ■ ■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■■■ ■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■ ■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ The record displays active status, with approval dated June xx.xx 2024, and expiry dated May xx.xx 2029.

The commercial distinction is between manufacture, registration representation, and actual supply. ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■ ■■■ ■■■■■■■■ The documented registration concerns the named nonwoven product, not automatic access for the broader Pharmapore range.

Sources & Evidence

1. Pharmapore Sterile Post-operative Dressings
   - Pharmaplast's Pharmapore brochure advertises sterile postoperative dressings for surgical wounds and incisions, including nonwoven and film-backed variants.
   - Company verification: Pharmaplast's Pharmapore brochure offers a named family of sterile postoperative dressings for surgical wounds and incisions and supplies Egyptian business contacts.
2. Pharmapore Sterile Adhesive Nonwoven Dressing - NAFDAC Greenbook
   - NAFDAC identifies Pharmaplast S.A.E. in Egypt as manufacturer and Excellent Port Company Limited as applicant for Pharmapore Sterile Adhesive Nonwoven Dressing.
   - The record displays active status, approval on June xx.xx 2024, and expiry on May xx.xx 2029. It identifies registration parties rather than establishing distribution rights or realized fulfillment.
   - Company verification: The Nigerian regulatory record identifies Pharmaplast S.A.E. in connection with Pharmapore sterile adhesive nonwoven postoperative dressings.
   - Company verification: NAFDAC identifies Pharmaplast S.A.E in Egypt as manufacturer of Pharmapore Sterile Adhesive Nonwoven Dressing, described as a postoperative surgical dressing.
   - Company verification: The record shows active status, approval on June xx.xx 2024, and expiry on May xx.xx 2029.

20.9. Covalon Technologies Ltd.

Covalon combines an identified post-surgical dressing portfolio with several routes to customer access. ■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ These are company-level commercialization models; they do not establish a license or local availability for every named postoperative product.

For prospective distributors and licensees, the decision is how much customer access and selling responsibility to assume. Covalon explains that its OEM approach places major selling costs with partners, while its own sales force provides a direct hospital interface. ■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■ ■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■■

Sources & Evidence

1. Covalon Technologies Ltd. - MD&A Q1 F-2026
   - The fiscal 2026 first-quarter disclosure lists SurgiClear and MediClear Post-Op Absorb, describes direct and partner commercialization channels, and states that product availability differs by country.
   - The operating discussion identifies temporary disruption associated with a US advanced-wound-care strategic partner's ownership transition; it does not identify that disruption as postoperative-product-specific.
   - Company verification: Covalon's fiscal 2026 first-quarter filing identifies SurgiClear as a post-surgical dressing and lists MediClear Post-Op Absorb in its surgical and perioperative portfolio.
   - Company verification: The filing describes direct US hospital sales, international distribution, private-label arrangements, and licensing business models.
   - Company verification: The filing provides recent operating and reporting-entity evidence without separately attributing postoperative-dressing revenue.
2. Covalon Technologies Ltd. - 2024 Management's Discussion and Analysis
   - The disclosure describes direct hospital selling, distribution, private-label arrangements and licensing; its OEM model assigns major selling costs to partners.
   - Partner-performance and contractual risks support a conditional assessment of customer-interface control rather than an assumption that licensing removes execution exposure.
   - Company verification: Covalon's 2024 management discussion lists SurgiClear as a post-surgical dressing and MediClear Post-Op Absorb as an absorbent-pad dressing.
   - Company verification: The filing describes a US direct sales force, North American distribution relationships, and private-label and licensing business models.

20.10. Advamedica Inc.

Advamedica's MaxioCel is an identified chitosan gelling-fiber wound-dressing offering with a named US distribution route. ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■■■

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This separates product clearance from customer access. Safe N Simple contributes its advertised national sales and distribution network, but a 2026 announcement does not establish the same relationship in 2025 or realized hospital adoption. ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

Sources & Evidence

1. FDA 510(k) Premarket Notification - Maxiocel Chitosan Wound Dressing, K212766
   - FDA record K212766 identifies Advamedica, Inc. as applicant for Maxiocel Chitosan Wound Dressing and records a substantially equivalent decision on August xx.xx 2023.
   - The record establishes the named regulatory relationship, not distribution performance or payer coverage.
2. Safe N Simple LLC and Advamedica Announce Nationwide Distribution Partnership for MaxioCel in the United States
   - The announcement body dated April xx.xx 2026 names Safe N Simple as a national US distribution partner for Advamedica's MaxioCel chitosan gelling-fiber dressing.
   - It includes surgical wounds among applications and describes the partner's national network, without establishing executed exclusivity or realized customer adoption.
   - Company verification: The announcement identifies Advamedica Inc. as the commercial partner supplying the MaxioCel wound-care portfolio for nationwide US distribution.
   - Company verification: MaxioCel is described as a wound dressing with surgical wounds among its applications.

20.11. Vuelo Pharma

Vuelo Pharma positions Membracel as a specialty cellulose-membrane dressing for surgical wounds and post-cauterization or laser lesions. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪

The Membracel site promotes My Care purchase links and Brazilian regional delivery, while Vuelo's FAQ directs purchasers to nearby resellers. Patient-facing promotion gives households a purchasing lead, but does not establish the active contracting seller, destination-specific fulfillment or hospital purchasing eligibility. ▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

Sources & Evidence

1. Membracel - Vuelo Pharma
   - Vuelo Pharma's Membracel site identifies a cellulose-membrane offering and lists surgical wounds and post-cauterization or laser lesions.
   - It promotes My Care purchase links and Brazilian regional delivery; these representations do not independently establish a particular seller's fulfillment commitment.
   - Company verification: Vuelo Pharma's Membracel product site publicly advertises the dressing for surgical wounds.
   - Company verification: The site identifies Vuelo Pharma as the business behind Membracel and provides online-purchase links and Brazilian delivery coverage.
2. FAQ EN - Vuelo Pharma
   - Vuelo's purchasing FAQ directs Membracel purchasers to identify a nearby reseller through its website.
   - The reseller direction supports distinguishing consumer purchasing leads from a verified manufacturer-direct or institutional supply commitment.

20.12. MedCu Technologies

MedCu Technologies advertises copper-based finished wound dressings in adhesive and nonadhesive configurations, with surgical wounds among its stated applications. ■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■ This establishes an offering-specific US regulatory record alongside the public portfolio, rather than participation inferred solely from a material name.

For buyers comparing antimicrobial options, MedCu provides a distinct copper-based proposition, but purchasing still concerns an exact dressing configuration and local commercial relationship. ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■■ Neither the clearance record nor the company's positioning establishes comparative postoperative superiority or transfers authorization to another jurisdiction.

Sources & Evidence

1. MedCu - Advanced Copper-Based Wound Dressings
   - MedCu advertises copper-based finished dressings with and without an adhesive contour and includes surgical wounds among its applications.
   - The offering distinctions support configuration-specific purchasing, not a conclusion of comparative postoperative superiority.
   - Company verification: MedCu advertises copper-based complete wound dressings with surgical wounds among their stated applications.
   - Company verification: The company provides a Herzliya business address.
2. FDA 510(k) Premarket Notification - MedCu Antibacterial Wound Dressings with Copper-Oxide, K180643
   - FDA record K180643 names Medcu Technologies, Ltd. as applicant for MedCu Antibacterial Wound Dressings with Copper-Oxide and records a substantially equivalent decision on November xx.xx 2018.
   - This is an offering-specific US regulatory record, not proof of authorization or funded purchasing in other jurisdictions.

20.13. Jamjoom Medical Industries

Jamjoom Medical Industries presents Film Post-Operative Dressing as a Jeddah-manufactured offering supplied directly to Saudi hospitals. ■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■ This establishes an advertised local manufacturer-to-hospital proposition, not an independently confirmed public award.

Saudi institutional buyers can use that product-team route for direct supply discussions. Before relying on local manufacture, they should confirm the contracting entity behind the shared Jamjoom Medical Solutions branding, offering-level Saudi status and binding delivery terms. ■ ■■■■■■■■ ■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■

Sources & Evidence

1. Film Post-Operative Dressing - Jamjoom Medical Industries | Jamjoom Medical Solutions
   - The product page attributes Film Post-Operative Dressing to Jamjoom Medical Industries' Jeddah plant and describes direct supply to Saudi hospitals.
   - It directs configuration and tender discussions to the institutional product team; it does not establish an individual public award.
   - Company verification: Jamjoom Medical Industries advertises Film Post-Operative Dressing.
   - Company verification: The product page identifies manufacturing at its Jeddah facility and institutional supply across Saudi Arabia.
2. Plant | Jamjoom Medical Solutions
   - The Jamjoom plant page describes its Saudi manufacturing operations and Jeddah facility under Jamjoom Medical Solutions branding.
   - The manufacturing description supports the advertised domestic supply proposition, not a conclusion about tender preference or comparative fulfillment speed.

20.14. Médicale Gaze

■■■■■■■■ ■■■■ ■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■■ Its portfolio distinguishes that offering from a children's orthoptic eye patch. Ophthalmic purchasing teams therefore have a specific product identity to request, rather than treating all eye coverings as substitutes or extrapolating from general surgical-gauze participation.

The company's business description identifies Tunis manufacturing, MEGA-brand distribution through commercial partners and OEM arrangements. Specialty distributors can examine branded supply or a separately contracted OEM relationship, but a general OEM capability does not grant rights to rebrand OPTIPAD. ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■

[redacted]

Sources & Evidence

1. OPTIPAD - Médicale Gaze
   - The OPTIPAD product page distinguishes children's orthoptic occlusion from the adult dressing's post-intervention protection and absorption applications.
   - This supports an adult postoperative ophthalmic offering, not interchangeability among all eye coverings.
2. About - Médicale Gaze
   - Médicale Gaze describes Tunis manufacturing and commercial access through MEGA-brand distribution partners and OEM arrangements.
   - Those company-level business models do not establish product-specific rebranding rights, local purchasing acceptance or continuing OPTIPAD fulfillment.
   - Company verification: Médicale Gaze identifies itself as a designer, manufacturer, and marketer of single-use medical devices with manufacturing sites in Tunis.
   - Company verification: Its stated business includes dressings and supply through commercial partners and OEM relationships.
3. Médicale Gaze product catalog
   - Company verification: Médicale Gaze's catalog offers adult OPTIPAD external eye dressings for protection and absorption after an intervention.
   - Company verification: The specialty postoperative offering does not establish a broader cutaneous incision-dressing portfolio.

20.15. ALCARE Co., Ltd.

[redacted] Its business description explicitly includes postoperative surgical wounds and connects perioperative, post-discharge and community-care needs. The supplier presents several documented dressing formats within a care-continuity proposition, not a single-format response to all postoperative requirements.

[redacted] ALCARE's stated continuity ambition is not itself a replenishment contract, and different formats in the same catalog do not establish interchangeable specifications. Outside Japan, local availability and authorized distribution require separate confirmation; the Japanese portfolio alone does not establish a global delivery commitment.

Sources & Evidence

1. ドレッシング材｜商品情報（医療関係者向け）
   - ALCARE's Japanese professional catalog lists KARAYAHESIVE hydrocolloid products, SILKYPORE DRESSING as an adhesive island dressing, and MULTI FIX-PAD as a film dressing with an absorbent pad.
   - The catalog establishes differentiated offering formats, not cross-setting interchangeability or a global supply commitment.
   - Company verification: ALCARE's Japanese dressing catalog continues to list KARAYAHESIVE, SILKYPORE DRESSING, and MULTI FIX-PAD.
   - Company verification: The catalog corroborates an ongoing public dressing portfolio rather than relying exclusively on the older English brochure.
2. 事業紹介｜アルケア株式会社
   - ALCARE's wound-care business description explicitly includes postoperative surgical wounds and discusses perioperative, post-discharge and community-care continuity.
   - Its stated care-continuity objective supports examining discharge-related supply arrangements but does not establish an executed replenishment service.
   - Company verification: ALCARE's business description explicitly includes postoperative surgical wounds within its wound-care business.
   - Company verification: It describes dressing products serving perioperative and post-discharge care.
3. During/After Operation Management Solution
   - Company verification: ALCARE's postoperative-management brochure identifies dressing offerings including KARAYAHESIVE, MULTI FIX-PAD, and SILKYPORE DRESSING.
   - Company verification: The brochure connects the named dressing portfolio to after-operative wound management.

20.16. Aroa Biosurgery Limited

Aroa Biosurgery Limited presents a specialty restorative-bioscaffold proposition through Endoform Natural and Endoform Antimicrobial. Advertised surgical applications include donor sites, grafts, post-Mohs surgery, post-laser surgery and wound dehiscence. ■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■

AROA also offers dedicated reimbursement assistance and Endoform-specific coding information. That support can help providers navigate purchasing administration, but AROA expressly leaves coding responsibility with the provider and does not guarantee payer coverage. ■■■ ■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■

Sources & Evidence

1. Endoform | AROA
   - AROA presents Endoform Natural and Endoform Antimicrobial Restorative Bioscaffold products with surgical applications including donor sites, grafts, post-Mohs surgery, post-laser surgery and wound dehiscence.
   - The page expressly qualifies country availability and licensed indications and states that reimbursement information does not guarantee coverage.
   - Company verification: Aroa's current portfolio offers Endoform Natural and Endoform Antimicrobial Restorative Bioscaffold products.
   - Company verification: The advertised applications include surgical wounds, post-Mohs surgery, post-laser surgery, and wound dehiscence.
   - Company verification: The page identifies Aroa Biosurgery Limited and states that availability and licensed indications vary by country.
2. Reimbursement | Aroa Biosurgery
   - AROA provides dedicated reimbursement assistance and Endoform-specific coding information.
   - Its disclaimer retains provider responsibility for coding and payer-policy checks and expressly states that AROA does not guarantee coverage.

21. Companies Covered

Table 526. Global Post-Operative Wound Dressings Market, Companies Covered

Company
ABENA Holding A/S
AddLife
Advamedica Inc.
Advanced Medical Solutions Group plc
Adwaa Al Sharq Medical
Aero Healthcare
Agary Pharmaceutical Limited
Al Essa Med
Al Mutawa Ph
ALCARE Co., Ltd.
Alfarsi Medical Supplies
Allmed Medical
ALMAR SRL
AMAD Gulf Industrial Co.
AMD Medicom Inc
AMERX Health Care
Aroa Biosurgery Limited
Arsin Salamat Iranian
Aumet For Pharmaceuticals & Medical Disposables Co.
Avery Dennison Corporation
B. Braun SE
Bastos Viegas, S.A.
Batist Medical a.s.
Be Safe Paramedical (Pty) Ltd
Beier Drawtex Healthcare (Pty) Ltd
Beiersdorf AG
Betasan
Biotekfarm
Bravida Medical
Brightwake Limited

Table 526 - continued

Company
Cansın Sağlık Gereçleri Sanayi ve Ticaret A.Ş.
Cardinal Health
Cardio Edge Medical Trading - FZCO
CareNow Medical Pvt Ltd
Caspian Tajhiz Mahan Co.
CFAO Healthcare
ChitoTech
Coloplast
Convatec
Corman SpA
Cotton Craft (Pvt.) Ltd.
Covalon Technologies Ltd.
Croyance Medical Equipment Trading LLC
CurALL
Datt Mediproducts Pvt. Ltd.
DBS
Degasa
DermaRite Medical
DeRoyal Industries
Diagno-Pharm (Malaysia) Sdn Bhd
Dr. Ausbüttel GmbH & Co. KG
Dr. Sethi Pharmaceutical Industries
Dukal LLC
Dynamed
Dynamic Techno Medicals Pvt. Ltd.
Dynarex Corporation
Egypt for Medical Clothes
Elite-Ag
Eloquest Healthcare, Inc.
Essity
Euromed Surgicals Ltd
Eurosirel

Table 526 - continued

Company
Eurospital S.p.A.
Evercare Medical
Everest Medical
Excellent Port Company Limited
Farmac-Zabban S.p.A.
Farmaceutici Damor S.p.A.
Farmacias Julios
Ferris Mfg. Corp.
Fidia Farmaceutici S.p.A.
Filta Safety (Malaysia) Sdn. Bhd.
FORANS Medical GmbH
Fullcare Surgical Ltd
Gaspunt, S.A.
Genewel Co., Ltd.
Gentell
Getz Healthcare
GoMed
Green Heart Pharmacy
Hafiz Pharma Industry
Hakuzo Medical
Hannox International Corp.
Healthium Medtech Limited
Healthway
Hemostasis, LLC
Henry Schein Medical GmbH
Hollister Incorporated
Honnes
Huizhou Foryou Medical Devices Co., Ltd.
Human BioSciences, Inc.
IBERHOSPITEX, S.A.
IGAR
Integra LifeSciences Holdings Corporation

Table 526 - continued

Company
IRAP Non-Pharma Limited
Jalil Medical Factory
Jamjoom Medical Industries
Jeel Al-Seha Company
JMS S.A.S.
JTC
Kamion Pharma
Kondor Medikal OOD
Kuteks
Laboratoires Brothier
Laboratoires Euromedis
Laboratorio Celina
Laboratorios Emetex
LIBATAPE PHARMACEUTICAL CO., LTD.
Life Care Sağlık Ürünleri Tic. Ltd. Şti.
Loft Medical
Lohmann & Rauscher
MaiMed GmbH
Maisha Medical
Manarti Exports
McKesson Medical-Surgical Inc.
MedCu Technologies
Medela AG
MedHub
Medicalmart Pharmacy
Medicareplus International
Medicox LTDA
Medihealth Trading W.L.L.
MediPurpose
Mediq
MEDISEI
Medline Inc.

Table 526 - continued

Company
Milliken & Company
Miro Establishment for Trading
Missner & Missner Ltda.
MPM Medical
Multigate
Médicale Gaze
Mölnlycke Health Care
Nhara
NICHIBAN Co., Ltd.
Nipro
Nitto Denko Corporation
NOBAMED Paul Danz AG
Numed Industries, LLC
Octamed
Ortopedia Suiza
Osaki Medical Corp.
Panamed Philippines Inc.
PARADIZ
PAUL HARTMANN AG
Pharmaplast S.A.E.
Phoenicia
PIKDARE S.p.A.
Pinnikle Sdn Bhd
Plastod S.p.A.
Polar Fix
PolyMed
PT Medela Potentia Tbk
Pureline Medical Company
Reavley Chemist GH
Regino Medicals Limited
Riasa S.R.L.
Richardson Healthcare

Table 526 - continued

Company
Safe N Simple LLC
Sanara MedTech Inc.
SAS MED
Saudi Mais Co.
Secure The Life
Seyitler Kimya
Sion Medical
SM Health Care Sdn Bhd
Smith+Nephew
SOCIETE PARA PHARMA PROMOTION
SOCOTHYD
Solventum Corporation
SOZA Healthcare
Sterifil
Steril Medical Private Limited
Steroplast Healthcare Limited
Super Care Medical Supplies
Surgo Surgical Supply
Tagumedica
Textil Planas Oliveras S.A.
The Stevens Company
Todo Medica
Tosama d.o.o.
Treetta
Tronjen Medical
Turuq Al_Tashkis Company
TZMO SA
ULTIMED
UNICARE BIOMEDICAL INC.
URGO Medical
VitalHealth
Viveo

Table 526 - continued

Company
Vuelo Pharma
Winner Medical Co., Ltd.
Wynnmed Healthcare Products
YANT Industrial Trading Company
Young Chemical Co., Ltd.
Zafire Distributors, Inc.
ZARYS International sp. z o.o.
Zhejiang Longterm Medical Technology Co., Ltd.
Zhende Medical

Sources & Evidence

1. Advanced Wound Care
   - Company verification: The September 2025-August 2027 framework names Richardson Healthcare Ltd as a supplier, corroborating an institutional channel alongside its captured Clearpore offering.
   - Company verification: The current framework names Steroplast Healthcare Ltd, supplementing its captured postoperative Steropad offering with institutional-channel evidence.
   - Company verification: The framework names Medicareplus International Limited; this establishes a wound-care procurement channel, not product-specific postoperative eligibility.
   - Company verification: The framework names Mediq Healthcare UK Ltd, corroborating a UK wound-care channel without independently establishing the entire Mediq ownership structure.
   - Company verification: Integra LifeSciences is a named framework supplier; framework participation does not establish current availability of recalled MediHoney products.
   - Company verification: Named advanced wound-care framework supplier.
   - Company verification: Listed as Essity trading through BSN Medical.
   - Company verification: L&R Medical UK is a listed supplier.
   - Company verification: B. Braun Medical is a listed supplier.
   - Company verification: Medline Industries is a listed supplier.
   - Company verification: URGO LIMITED is a listed supplier.
   - Company verification: Advanced Medical Solutions Ltd is listed.
   - Company verification: Brightwake Limited is identified as trading as Advancis Medical.
   - Company verification: Gentell UK is a listed supplier.
2. RICHARDSON HEALTHCARE LIMITED overview - Find and update company information - GOV.UK
   - Company verification: Companies House identifies Richardson Healthcare Limited, company number xx.xx as an active private limited company.
   - Company verification: The registry supports the UK Limited identity but does not explain the Inc. reference on the company's product website.

3. Clearpore - Transparent Film Dressing with Pad by Richardson Healthcare
   - Company verification: The current Clearpore page expressly includes postoperative wounds and provides product-ordering references and UK business contacts.
   - Company verification: The page retains Richardson Healthcare Ltd references alongside a Richardson Healthcare, Inc. copyright statement.
   - Company verification: Richardson Healthcare offers Clearpore as a transparent postoperative film-and-pad dressing and supplies public ordering references.
   - Company verification: The page provides a UK business address.
   - Company verification: The same page contains both Richardson Healthcare Ltd and Richardson Healthcare, Inc. references, leaving the exact legal reporting name unresolved.
4. Covalon Technologies Ltd. - MD&A Q1 F-2026
   - Company verification: Covalon's fiscal 2026 first-quarter filing identifies SurgiClear as a post-surgical dressing and lists MediClear Post-Op Absorb in its surgical and perioperative portfolio.
   - Company verification: The filing describes direct US hospital sales, international distribution, private-label arrangements, and licensing business models.
   - Company verification: The filing provides recent operating and reporting-entity evidence without separately attributing postoperative-dressing revenue.
5. Post operatori - Presteril
   - Company verification: Presteril's postoperative catalog advertises named delicate, waterproof, Sili-Soft, and ialuPRO dressing families.
   - Company verification: The catalog identifies Corman SpA, its Italian address, and VAT identifier, connecting the postoperative portfolio to the staged company.
6. Cerotti post-operatori sterili IMPERMEABILI - Presteril
   - Company verification: The official product page offers complete sterile waterproof postoperative dressings under Presteril.
   - Company verification: Corman SpA is identified in the product page's business information.
7. 2026 医療材総合カタログ - ニチバン株式会社
   - Company verification: Nichiban's 2026 medical catalog explicitly places CATHEREEPLUS PAD under postoperative wound covering and protection.
   - Company verification: This product-specific record resolves the inherited uncertainty arising from reliance on a broader surgery/ICU category.
8. [優肌] パーミパッド | 株式会社ニトムズ メディカル製品専用サイト
   - Company verification: Nitoms currently advertises Yuki Permepad as a complete waterproof film dressing with an absorbent pad.
   - Company verification: The inspected page improves complete-dressing evidence but does not explicitly establish postoperative positioning.
   - Company verification: The Yuki Permepad listing advertises a complete pad-and-film dressing for sutured wounds, names Nitto Denko as the responsible manufacturing/marketing entity, and names Nitoms as seller. It does not establish physical manufacturing attribution or realized sales. ([medical.nitoms.com](https://medical.nitoms.com/medical/products/woundcare/yuki-permepad.html))
9. Gentell chega ao Brasil e Paraguai com aquisição da Casex
   - Company verification: The company announcement states that Gentell LLC completed the Casex acquisition on June xx.xx 2025.
   - Company verification: The transaction included Casex products, personnel, and manufacturing assets in Brazil and Paraguay, with rebranding under Gentell.
   - Company verification: This supports consolidated attribution of the captured Casex postoperative portfolio to Gentell rather than a separate Casex company representation.

10. Wound and Burn Dressing Recall: Integra LifeSciences Removes Certain MediHoney and CVS Wound and Burn Products
    - Company verification: The FDA's March xx.xx 2026 update classifies the identified MediHoney and CVS wound-product action as a Class II recall.
    - Company verification: The notice identifies affected MediHoney wound-and-burn products and reports packaging-related sterile-barrier concerns.
    - Company verification: The recall creates a material availability limitation; historical portfolio references cannot establish current saleable supply.
    - Company verification: The FDA communication's March xx.xx 2026 update identifies the action as a Class II recall. The notice covers the identified MediHoney wound-and-burn products and certain CVS gel lots and continues to describe removal from use or sale; it does not establish resumed supply. ([fda.gov](https://www.fda.gov/medical-devices/medical-device-recalls-and-early-alerts/wound-and-burn-dressing-recall-integra-lifesciences-removes-certain-medihoney-and-cvs-wound-and-burn))
11. Island Dressings - Sterile
    - Company verification: Dynarex's current own-company catalog advertises Dürma+ sterile island dressings.
    - Company verification: The inspected listing does not explicitly establish postoperative use, so it supplements current portfolio evidence without resolving exact-market eligibility.
12. Our Product Portfolio - Medicareplus
    - Company verification: Medicareplus currently advertises standard and advanced wound-care dressings and Nurse It sterile dressing packs.
    - Company verification: The inspected portfolio does not establish a named complete dressing with explicit postoperative positioning.
13. GPSFarma HIPOALERGIC CLINICARE POST 10x10 APO ADH
    - Company verification: The inspected GPSfarma listing offers Hipoalergic Clinicare as a postoperative dressing and attributes the laboratory to RIASA S R L.
    - Company verification: This is a channel attribution and offering association, not independent proof of Riasa's current legal ownership or manufacturing responsibility.
14. Alpheta Katalog 2021
    - Company verification: Honnes' company-hosted ALPHETA catalog identifies Honnes Sağlık ve Endüstriyel Ürünler A.Ş. and presents sterile polyurethane and nonwoven wound dressings.
    - Company verification: The older catalog does not independently establish current postoperative-specific availability.
15. Servizi - Eurosirel
    - Company verification: Eurosirel's official business-services page describes an integrated private-label manufacturing and commercialization business.
    - Company verification: This supports its commercial supplier role but does not independently establish a named currently marketed postoperative dressing.
16. April 4, 2024 - 8-K: Current report
    - Company verification: The filing identifies Solventum Corporation and establishes its separation from 3M effective April xx.xx 2024.
17. Advanced wound care and skin care solutions
    - Company verification: The Solventum-hosted wound-care catalog includes Tegaderm dressings with closed surgical-incision positioning.
18. OPSITE POST OP | Smith+Nephew Global
    - Company verification: Smith+Nephew markets OPSITE POST-OP transparent waterproof dressings for postoperative incision protection.
19. Mepilex Border Post-Op
    - Company verification: Mölnlycke offers Mepilex Border Post-Op as a self-adherent absorbent surgical dressing and provides procurement information.

20. AQUACEL SURGICAL cover dressing
    - Company verification: Convatec offers AQUACEL SURGICAL cover dressings for postoperative management of surgical incisions.
21. Cosmopor Steril
    - Company verification: HARTMANN markets Cosmopor Steril adhesive dressings for postsurgical wounds and incision sites in its US portfolio.
22. Leukomed
    - Company verification: Essity's Australian portfolio offers Leukomed sterile absorbent dressings following surgical intervention.
23. L&R Global: Curapor
    - Company verification: Lohmann & Rauscher offers Curapor sterile surgical dressings with an explicitly stated postoperative application.
24. Askina DresSil Active
    - Company verification: B. Braun's catalog offers Askina DresSil Active bordered silicone dressings for surgical wounds.
25. Biatain Alginate
    - Company verification: Coloplast's US professional portfolio lists Biatain Alginate for postoperative surgical wounds.
26. Optifoam Gentle Post-Op Foam Wound Dressings
    - Company verification: Medline's catalog identifies Medline as manufacturer of Optifoam Gentle Post-Op Foam Wound Dressings.
27. Optifoam Gentle Post-Op Silicone/Foam Wound Dressing
    - Company verification: Medline's home-care storefront offers Optifoam Gentle Post-Op dressings explicitly for postoperative wound care.
28. Medline Reports Fourth Quarter and Full Year 2025 Results
    - Company verification: The February xx.xx 2026 corporate release identifies Medline Inc. and reports completion of its initial public offering.
29. Telfa Adhesive Island Dressings
    - Company verification: Medline's inspected channel catalog lists Telfa Adhesive Island Dressings with Cardinal Health identified as manufacturer.
30. Urgo Medical | UrgoTul Range details
    - Company verification: URGO Medical's UK portfolio offers UrgoTul and UrgoTul Absorb products with postoperative-wound positioning.
31. Establishment Registration & Device Listing
    - Company verification: The FDA device listing names ActivHeal Surgical Ag and Primaseal Post Op AG+, identifies Advanced Medical Solutions Ltd, and names Advanced Medical Solutions Group PLC as owner/operator.
    - Company verification: This is establishment and product-listing evidence, not proof of approval or sales.
32. Foam Dressing - Wound Care Range - ActivHeal Foam
    - Company verification: The ActivHeal portfolio offers foam dressings explicitly positioned for postoperative surgical wounds.
33. Covaderm GTL Silicone Composite Wound Dressing
    - Company verification: DeRoyal offers Covaderm GTL silicone composite wound dressings and includes incisions among their stated applications.
34. Super Absorbent Dressing - Winner Medical
    - Company verification: Winner Medical's official portfolio offers superabsorbent dressings and expressly includes postoperative care among their applications.

35. 510(k) Premarket Notification: K221311
    - Company verification: FDA record K221311 identifies Winner Medical Co., Ltd. as applicant for Antibacterial Bandage and records a substantial-equivalence decision on June xx.xx 2023.
    - Company verification: The record corroborates company identity and a regulatory product role, not postoperative sales.
36. Nonwoven Island Dressing - Allmed Medical
    - Company verification: Allmed Medical offers a Nonwoven Island Dressing expressly positioned for surgical incisions.
37. MRP_by_Division - Final.xlsx
    - Company verification: Healthium's published CareNow division product list includes commercial Theruptor NXT dressing entries.
    - Company verification: The list establishes portfolio association but does not independently establish the legal ownership relationship.
38. Theruptor NXT Wound Dressing
    - Company verification: The Theruptor NXT product document identifies Healthium Medtech Limited as marketer and includes surgical-wound categories.
    - Company verification: CareNow's official domain hosts the Theruptor NXT product document, establishing a public product-document association but not current ownership or a separate sales role.
39. CATHEREEPLUS PAD | NICHIBAN Co., Ltd.
    - Company verification: Nichiban's official portfolio offers CATHEREEPLUS PAD, a film dressing with an absorbent pad.
    - Company verification: The inspected page does not establish postoperative-specific positioning.
40. Essential products for Ambulatory Surgery Centers
    - Company verification: Dukal's ambulatory-surgery portfolio includes island dressings, transparent dressings, gauze, and ABD pads.
41. Dukal Provista Contract Catalog
    - Company verification: Dukal's 2026 catalog lists sterile composite island dressings and sterile nonwoven island dressings as offered products.
42. Establishment Registration & Device Listing
    - Company verification: The FDA listing identifies DUKAL LLC as owner/operator and specification developer for listed transparent, hydrocolloid, silicone foam, and foam dressings.
43. Sterile Island Dressings
    - Company verification: Medline's inspected channel catalog identifies Dynarex Corporation as manufacturer of Sterile Island Dressings.
44. Advazorb - Advancis Medical
    - Company verification: Advancis Medical's official portfolio offers Advazorb absorbent foam dressings.
45. Pharmapore Sterile Post-operative Dressings
    - Company verification: Pharmaplast's Pharmapore brochure offers a named family of sterile postoperative dressings for surgical wounds and incisions and supplies Egyptian business contacts.

46. NAFDAC Greenbook product record: Pharmapore sterile adhesive nonwoven dressing
    - Company verification: The Nigerian regulatory record identifies Pharmaplast S.A.E. in connection with Pharmapore sterile adhesive nonwoven postoperative dressings.
    - Company verification: NAFDAC identifies Pharmaplast S.A.E in Egypt as manufacturer of Pharmapore Sterile Adhesive Nonwoven Dressing, described as a postoperative surgical dressing.
    - Company verification: The record shows active status, approval on June xx.xx 2024, and expiry on May xx.xx 2029.
    - Company verification: The same product record names Excellent Port Company Limited as the Nigerian local entity associated with the registered dressing; this does not establish actual distribution or sales.
    - Company verification: NAFDAC names Excellent Port Company Limited as applicant for the active Pharmapore postoperative-dressing registration.
    - Company verification: Applicant status does not by itself establish current importing, distribution, procurement, or sales.
47. Transparent Film with Island Dressing - Wynnmed Healthcare Products
    - Company verification: Wynnmed's official portfolio offers a ProCure transparent film island dressing explicitly positioned for postoperative sites.
    - Company verification: The inspected product page does not settle the legal owner or parent-company reporting level.
48. Gentell Catalog 2022
    - Company verification: Gentell's catalog offers Compdress Island Dressings and Gentell Bordered Gauze as primary or secondary dressing products.
    - Company verification: The catalog supports the offering relationship; postoperative-specific positioning requires additional substantiation.
49. McKesson Advanced Wound Care Catalog
    - Company verification: McKesson's own catalog offers McKesson Island Dressings and Barrier Island Dressings and identifies its medical-surgical ordering channel.
50. AccessGUDID - DEVICE: McKesson (10612479184920)
    - Company verification: The government device record identifies McKesson Medical-Surgical Inc. and an island dressing product.
51. History - Bravida Medical
    - Company verification: The company history connects Argentum Medical and BioDerm with the Bravida Medical business.
    - Company verification: The page provides business contacts in Illinois and Florida.
52. Silverlon Surgical Island Dressings - Bravida Medical
    - Company verification: Bravida publicly offers Silverlon Surgical Island Dressings for applications including surgical wounds.
    - Company verification: The page cautions that clinical product availability can vary by country.
53. About Us - PolyMem Dressings
    - Company verification: Ferris Mfg. Corp. identifies itself as a privately owned producer and distributor of PolyMem and other dressing brands.
54. Home - PolyMem Dressings
    - Company verification: The detailed PolyMem product presentation includes surgical wounds among the advertised applications for its dressing portfolio.
55. Covalon Technologies Ltd. - 2024 Management's Discussion and Analysis
    - Company verification: Covalon's 2024 management discussion lists SurgiClear as a post-surgical dressing and MediClear Post-Op Absorb as an absorbent-pad dressing.
    - Company verification: The filing describes a US direct sales force, North American distribution relationships, and private-label and licensing business models.

56. Xeroform Petrolatum Gauze Dressing - Safe n Simple
    - Company verification: Safe n Simple publicly offers Simpurity Xeroform Impregnated Gauze dressings with surgical wounds and plastic surgery among the advertised applications.
57. Safe N Simple LLC and Advamedica Announce Nationwide Distribution Partnership for MaxioCel in the United States
    - Company verification: An announcement dated April xx.xx 2026 identifies Safe N Simple LLC as a nationwide US distribution partner for Advamedica's MaxioCel dressings.
    - Company verification: The announcement includes surgical wounds among MaxioCel's stated commercial applications.
    - Company verification: The announcement identifies Advamedica Inc. as the commercial partner supplying the MaxioCel wound-care portfolio for nationwide US distribution.
    - Company verification: MaxioCel is described as a wound dressing with surgical wounds among its applications.
58. FAQ - Wound Care and Medical Foods - DermaRite Medical
    - Company verification: DermaRite Medical identifies itself as part of SionBrands, the US commercial platform of the Sion Medical-Degasa Group.
    - Company verification: The FAQ states that DermaRite joined the group in 2025 and works through medical-equipment providers, distributors, online sellers, and pharmacies.
    - Company verification: DermaRite identifies itself as part of SionBrands, the US commercial platform of the Sion Medical-Degasa Group, and states that it joined the group in 2025.
    - Company verification: DermaRite's own group description names Degasa within the Sion Medical-Degasa platform; this corroborates overlap but does not resolve legal ownership percentages.
    - Company verification: DermaRite's current FAQ identifies Sion Medical within the group operating SionBrands, corroborating the shared commercial-platform relationship. ([dermaritemedical.com](https://dermaritemedical.com/faq/))
59. ComfortFoam Ag Border Silver Foam Dressing - DermaRite Medical
    - Company verification: DermaRite publicly offers ComfortFoam Ag Border silicone foam island dressings.
    - Company verification: Its stated applications include surgical wounds.
60. We're proud to welcome DermaRite wound care and nutrition portfolios to SionBrands
    - Company verification: The November xx.xx 2025 announcement welcomes DermaRite's wound-care and nutrition portfolios to SionBrands.
    - Company verification: Sion Medical identifies Degasa as its collaborator in SionBrands, described as their US headquarters platform.
61. Apósito Quirúrgico - Degasa
    - Company verification: Degasa's official catalog offers PROTEC surgical dressings for wound protection and absorption.
    - Company verification: The catalog establishes a complete surgical-dressing offering but does not explicitly separate postoperative use.
62. About us - Degasa
    - Company verification: Degasa's company page provides its business address in Tlalpan, Mexico City.
63. SKU and Distributor Information - Eloquest Healthcare, Inc.
    - Company verification: Eloquest lists ReliaTect Post-Op Dressing with CHG in its commercial SKU portfolio.
    - Company verification: The page identifies limited distributors through which ReliaTect is available.
64. About Eloquest Healthcare - Eloquest Healthcare, Inc.
    - Company verification: Eloquest identifies itself as the hospital subsidiary of Ferndale Pharma Group.
65. Multi-Layer Wound Dressings for Effective Care - MPM Medical
    - Company verification: MPM Medical's commercial product page offers a Multi Layered Wound Dressing and includes surgical wounds among its applications.

66. Advanced Wound Care - Surgical Care - Collagen - MPM Medical
    - Company verification: MPM Medical identifies its headquarters in Mesquite, Texas.
    - Company verification: Its detailed portfolio presentation advertises SteriSeal as a surgical dressing for postoperative incision management.
67. Collagen Wound Care Products: Particle, Sheet and Gel - Human BioSciences
    - Company verification: Human BioSciences' product catalog offers ColleCule LpH Collagen Pad for surgical and chronic wounds.
    - Company verification: The catalog identifies a US business contact in Martinsburg, West Virginia and labels the professional pad offering as prescription-required.
68. MediPurpose Introduces New MediPlus Advanced Wound Care Product Line
    - Company verification: MediPurpose's legacy Atlanta launch announcement identifies MediPlus PU Pad and MediPlus Surgical as post-surgical dressings.
    - Company verification: The announcement describes its medical-product distribution and private-label business role.
69. FDA K110062 - MediPlus-Foam AG Dressings
    - Company verification: The historical FDA record identifies MediPurpose Pte. Ltd. in connection with MediPlus-Foam AG, ComfortFoam AG, and SuperFoam AG dressings.
    - Company verification: The listed commercial indications include surgical incisions and excisions; the record alone does not establish current availability.
70. About Us - MediPurpose
    - Company verification: MediPurpose's company page continues to describe an offering of MediPlus Advanced Wound Care products.
    - Company verification: The page does not establish current availability of every historical postoperative SKU.
71. Dressing OPSITE Post-Op - Stevens
    - Company verification: Stevens' own catalog offers Smith+Nephew OPSITE Post-Op dressings.
    - Company verification: The page describes the business as a national Canadian medical-supply distributor with multiple Canadian locations.
72. Opsite Post-Op Apósito Quirúrgico con Film Adhesivo - VitalHealth
    - Company verification: VitalHealth's Spanish-language catalog advertises Smith+Nephew OPSITE Post-Op for postoperative and surgical-incision care.
    - Company verification: This establishes an observed offering under the VitalHealth trade name, not its legal identity or authorized-distributor status.
73. Catálogo Cuidado de Heridas - JTC
    - Company verification: JTC's wound-care catalog lists Convatec AQUACEL Ag SCD DRS as a postoperative dressing.
    - Company verification: The catalog provides JTC product references but does not establish the full legal entity, current authorization, or active sales.
74. BeneHold CHG Antimicrobial Adhesive Technology - Avery Dennison
    - Company verification: Avery Dennison's brochure presents BeneHold CHG technology for applications including postoperative dressings.
    - Company verification: The brochure identifies ReliaTect and Eloquest Healthcare trademarks as belonging to Ferndale IP, Inc.
    - Company verification: This supports an associated technology-platform role, not a current standalone complete-dressing sales claim.
75. Cardinal Health Composite Dressing - Cardinal Health Canada
    - Company verification: Cardinal Health's own Canadian catalog offers Cardinal Health Composite Dressing.
    - Company verification: Postoperative wounds are explicitly included among its stated applications.

76. Mepore Self-Adhesive Absorbent Post-Operative Dressing - Surgo Surgical Supply
    - Company verification: Surgo's official catalog advertises Mepore Self-Adhesive Absorbent Post-Operative Dressing and identifies the MÖLNLYCKE brand.
    - Company verification: The listing supports Surgo's channel role, not an inference that Surgo manufactures Mepore.
77. Nossas marcas - Viveo
    - Company verification: Viveo's current investor-relations brand portfolio includes Cremer, supporting representation of the identified Cremer dressing business at the Viveo group level.
78. Histórico - Viveo
    - Company verification: Viveo's corporate history identifies Cremer as an acquired healthcare-products business and describes its Brazilian operations.
79. Curativo Cirúrgico - Cremer
    - Company verification: Cremer publicly offers Curativo Cirúrgico and expressly includes post-surgical compressive dressings among its applications.
80. PRODUTOS - Polar Fix
    - Company verification: Polar Fix's official product portfolio lists Wound Care F Curativo Filme Transparente Pós-Operatório Estéril.
    - Company verification: The portfolio identifies Polar Fix's production and distribution business and its address in Mauá, Brazil.
81. Missner
    - Company verification: Missner's advanced-dressing catalog offers M-TEC absorbent polyurethane dressings and explicitly describes protection of surgical incisions.
82. Linhas - Missner
    - Company verification: Missner's official product-lines page identifies the business as MISSNER & MISSNER LTDA and links its advanced-dressing commercial portfolio.
83. Membracel - Vuelo Pharma
    - Company verification: Vuelo Pharma's Membracel product site publicly advertises the dressing for surgical wounds.
    - Company verification: The site identifies Vuelo Pharma as the business behind Membracel and provides online-purchase links and Brazilian delivery coverage.
84. Apósitos - Laboratorios Emetex
    - Company verification: Laboratorios Emetex's official catalog lists Apósito Común Pouch Simple Estéril products in several presentations.
    - Company verification: The category establishes an advertised complete-dressing portfolio but does not explicitly establish postoperative positioning.
85. Línea Cuidado de heridas - Medicox LTDA
    - Company verification: Medicox LTDA's wound-care catalog advertises a postoperative Mepilex offering and a post-surgical Telfa AMD offering.
    - Company verification: The catalog identifies Medicox's Colombian business location, supporting an advertised regional channel role.
86. Allevyn Sacrum - Tagumedica
    - Company verification: Tagumedica's official catalog advertises ALLEVYN Sacrum complete foam dressings and includes surgical wounds among their applications.
    - Company verification: The page lists a product registration reference; its current regulatory validity was not independently checked.
87. Apósito Primapore 25x10 cm Smith & Nephew - Precio Chile
    - Company verification: Ortopedia Suiza's Chilean product listing advertises Primapore dressings for covering postoperative surgical wounds.
    - Company verification: The listing supports an advertised retail channel, not a manufacturing role.

88. Hydrocare - curativo de hidrofibra CASEX - GENTELL - We make it better
    - Company verification: The Casex commercial store carries Gentell branding and advertises Hydrocare dressings for postoperative surgical wounds.
    - Company verification: The product record identifies Casex as the manufacturer and supplies a Brazilian business address.
    - Company verification: The page establishes a commercial association but does not independently establish the precise Gentell/Casex ownership or consolidation relationship.
89. Dressings - Zarys
    - Company verification: The official portfolio offers elastopor STERIL dressings for covering postoperative wounds.
    - Company verification: The page identifies ZARYS International sp. z o.o. and its Zabrze, Poland address.
90. Wound dressing - Plastod - Advanced Wound Care
    - Company verification: Plastod offers film dressings positioned for surgical sites alongside other wound-care applications.
    - Company verification: The official page identifies Plastod S.p.A. and its Italian business address.
91. Das sind wir von DRACO® - Ihr Partner in der Wundversorgung
    - Company verification: DRACO identifies itself as part of the owner-managed family business Dr. Ausbüttel GmbH & Co. KG.
92. Pflaster, steriler und unsteriler Wundschnellverband von DRACO
    - Company verification: The official DRACO plaster portfolio explicitly positions DracoPor products for acute and postoperative wounds.
93. MaiMed® porefix steril - einzeln verpackt
    - Company verification: MaiMed's official catalog offers porefix steril as a postoperative dressing for external wound coverage.
94. About us - MaiMed GmbH
    - Company verification: The official company page identifies MaiMed GmbH as a medical, care, protective, and hygiene-products business.
95. Wound care products for clinical environments and home care
    - Company verification: ABENA publicly offers sterile postoperative dressings, including waterproof and film versions.
    - Company verification: The page identifies ABENA Holding A/S at an Aabenraa, Denmark address.
96. About us - Brothier
    - Company verification: Laboratoires Brothier describes itself as an independent French company whose dressing products include applications in complex surgical wounds.
97. Algostéril - Brothier
    - Company verification: Brothier publicly presents Algostéril compresses and dressings.
    - Company verification: The official page identifies pharmacy availability and professional ordering through ALLOGA France.
98. Total assortment of medical supplies, equipment and services | Mediq
    - Company verification: Mediq identifies Klinion among its own brands and includes wound care in its product offering.
99. Wound care products and wound management solutions | Klinion
    - Company verification: Klinion's official wound-care portfolio includes border plasters for postoperative wounds.
100. List of distributors for information and orders | Klinion
    - Company verification: Klinion's official directory lists Mediq and other distribution contacts across multiple European countries.
    - Company verification: The directory provides channel evidence, not product-specific sales volumes.

101. Plasters - Tosama
    - Company verification: Tosama's official portfolio includes branded plasters for surgical wounds.
    - Company verification: The page identifies Tosama d.o.o. and its Domžale, Slovenia address.
102. Vivapore | Tosama
    - Company verification: Tosama's Serbian website lists sterile Vivapore dressing products.
103. Cerotto post operatorio Soffix Med
    - Company verification: The Italian Pic Solution page offers Soffix Med as a postoperative dressing for surgical wounds.
    - Company verification: The page names Pikdare S.p.A. as manufacturer.
104. Apósito postoperatorio Soffix Med
    - Company verification: Pic Solution maintains a Spanish-language Soffix Med postoperative-dressing offering.
    - Company verification: The language-specific portfolio does not independently establish Spanish sales.
105. Chi siamo - Presteril
    - Company verification: Presteril identifies Corman SpA as its Italian family-owned corporate business.
    - Company verification: The page describes a dressing portfolio sold through pharmacies and parapharmacies.
    - Company verification: The company states that Medipresteril returned to the Presteril brand name in 2024.
106. Products and Services - Batist Medical a.s.
    - Company verification: Batist Medical a.s.'s official portfolio includes wound dressings and ELASTPORE+PAD.
    - Company verification: The page identifies a Czech business address and separately names the production entity.
107. BATIST German-English Product Catalogue
    - Company verification: BATIST's hosted German-English catalog describes ELASTPORE+PAD as a complete absorbent-pad wound dressing.
    - Company verification: This catalog evidence does not by itself establish an explicit postoperative application.
108. Повязки медицинские силиконовые торговой марки IGAR - Igar
    - Company verification: IGAR's official silicone-dressing portfolio explicitly includes postoperative sutures among the stated commercial applications.
109. Хірургічні пов'язки торгової марки IGAR тип Прозорий (на поліуретановій основі)
    - Company verification: IGAR's official Ukrainian-language portfolio presents transparent surgical dressings with absorbent pads.
110. Steropad Non-Adhesive Double-Sided Wound Dressings - Pack of 25 - 5cm x 5cm
    - Company verification: Steroplast publicly offers Steropad absorbent dressings for postoperative wounds through its UK-facing catalog.
111. About Us - Steroplast Healthcare
    - Company verification: Steroplast's official business page describes its UK healthcare-supply role and hospital-facing medical-disposables portfolio.
112. Nasze rozwizania - Matopat - Wyroby medyczne
    - Company verification: Matopat's official materials identify Fixopore S and Fixopore F as postoperative dressings.
    - Company verification: The published portfolio materials connect Matopat products with TZMO SA.
113. Farmac Zabban wound-care product brochure
    - Company verification: The company-authored brochure describes Farmac Zabban as an Italian manufacturer and distributor serving hospitals, clinics, and pharmacies with surgical-dressing and wound-care products.
    - Company verification: The brochure alone does not establish a current named postoperative offering or Bulgarian sales.

114. Tapes & Wound Dressings
    - Company verification: MEDISEI's official catalog offers X-Med Medi Dress and Aqua Dress adhesive gauze-pad products.
    - Company verification: The catalog provides an Athens, Greece business address.
    - Company verification: The inspected category does not establish explicit postoperative positioning.
115. Contact | Evercare Medical
    - Company verification: Evercare Medical's official contact page identifies a Surgery, Wound & Hospital Care business unit serving European markets.
    - Company verification: This business-role evidence does not establish a named complete postoperative dressing.
116. OctaCare Non-Woven Wound Dressings | Octamed
    - Company verification: Octamed's official product page offers OctaCare Non-Woven Wound Dressings explicitly for postoperative sutured wounds.
117. Betapad Adhesive Surgical Dressing | Betasan
    - Company verification: Betasan advertises Betapad Adhesive Surgical Dressing as a complete dressing with an absorbent pad.
118. Our Products - Seyitler Kimya - Sağlık Üretiyoruz
    - Company verification: Seyitler offers Maxipore Dress and Maxipore PU Dress for postoperative wounds and sutured skin.
    - Company verification: The official page provides the company's Turgutlu, Manisa, Turkey address.
119. Wound Care Series - LifeCare
    - Company verification: LifeCare advertises nonwoven and transparent wound dressings expressly positioned for postoperative wound protection.
120. Contact - LifeCare
    - Company verification: The contact page identifies Life Care Sağlık Ürünleri Tic. Ltd. Şti. and provides its Kartal, Istanbul address.
121. Non-Woven Yara Pedi - Cansın Sağlık Gereçleri Sanayi ve Ticaret A.Ş.
    - Company verification: Cansın maintains an official Non-Woven Yara Pedi product listing.
    - Company verification: The page identifies the company and its Gebze, Kocaeli business location.
122. MEDCU-Advanced Copper Based Wound Dressings
    - Company verification: MedCu advertises copper-based complete wound dressings with surgical wounds among their stated applications.
    - Company verification: The company provides a Herzliya business address.
123. Products | Sion Medical
    - Company verification: Sion Medical's official portfolio includes sterile advanced wound-care products addressing surgical, acute, and chronic wounds.
124. Lomatuell Pro (Gel-Forming Dressing) - Arsin Salamat Iranian
    - Company verification: Arsin Salamat Iranian's catalog offers Lomatuell Pro and identifies postsurgical wounds among its applications.
    - Company verification: The page provides a Tehran business address.
125. General Medical Consumables - Caspian Tajhiz Mahan Co
    - Company verification: Caspian Tajhiz Mahan's official consumables catalog lists Transparent Waterproof Ready to Use Dressing.
126. ChitoUlcer - Chitotech Company
    - Company verification: ChitoTech maintains a dedicated company-operated product listing named ChitoUlcer.

127. Film Post-Operative Dressing - Jamjoom Medical Industries | Jamjoom Medical Solutions
    - Company verification: Jamjoom Medical Industries advertises Film Post-Operative Dressing.
    - Company verification: The product page identifies manufacturing at its Jeddah facility and institutional supply across Saudi Arabia.
128. Products - Saudi Mais Co.
    - Company verification: Saudi Mais's official product catalog includes transparent dressing and Manuka-honey dressing offerings.
129. Wound Care | Croyance Medical Equipment Trading
    - Company verification: Croyance advertises distribution of dressing categories addressing postoperative wounds.
    - Company verification: The page identifies Croyance Medical Equipment Trading LLC and business locations in Dubai and Abu Dhabi.
130. Advanced Wound Care Products & Dressings | Cardio Edge
    - Company verification: Cardio Edge advertises AQUACEL Surgical and AQUACEL Ag Surgical postoperative dressings through its supply network.
    - Company verification: The page identifies Cardio Edge Medical Trading - FZCO and a Dubai business location.
131. Activheal Silicone Foam Adhesive Border Dressing 10x10cm 10/Box - Medical Equipment Suppliers in Dubai | Buy Medical Supplies UAE
    - Company verification: MedHub lists an Activheal Silicone Foam Adhesive Border Dressing with postoperative surgical wounds among its stated applications.
    - Company verification: The listing's brand field names Molnlycke, creating an attribution issue requiring reconciliation.
132. WOUND CARE
    - Company verification: Pureline Medical Company describes a Qatar-based business and advertises a wound-care portfolio including postsurgical wounds.
133. SAS MED - BUSINESS | CARE | MEDICAL
    - Company verification: SAS MED advertises an inventory including nonwoven wound dressings, transparent dressings, absorbent dressings, and silver dressings.
134. Pic | yan
    - Company verification: YANT Industrial Trading Company's PiC page identifies a Jordanian distribution role and lists plasters and dressings within the represented portfolio.
135. Ruyan Corporate - Bahrain's Leading Healthcare Group Since 1945
    - Company verification: Ruyan's manufacturing page identifies Jalil Medical Factory in Bahrain and advertises dressing sets for wound care and surgical procedures.
136. Disinfection & Wound-care Division - Aumet For Pharmaceuticals & Medical Disposables Co.
    - Company verification: Aumet For Pharmaceuticals & Medical Disposables Co. maintains a dedicated Disinfection & Wound-care Division page.
137. Location : Welcome to Al-Essa Health Shop
    - Company verification: Al Essa Med's official store locator establishes business locations in Kuwait; it does not establish a postoperative product offering.
138. OPTIMAL WATERPROOF DRESSING 10CM*35CM - PARADIZ
    - Company verification: PARADIZ lists an Optimal waterproof dressing expressly positioned for postoperative care.
    - Company verification: The listing provides a Beirut, Lebanon contact location.
139. Medrull® - Super Care Medical Supplies®
    - Company verification: Super Care Medical Supplies identifies itself as Medrull's exclusive agent in Palestine.
    - Company verification: Its Medrull catalog advertises complete nonwoven and waterproof dressings for postoperative wounds.

140. About Us - Elite-Ag Advanced Wound Care Dressing
   - Company verification: Elite-Ag describes an advanced wound-dressing manufacturing and supply business headquartered in Salalah, Oman.
141. Surgical Instruments Suppliers Oman, Muscat | Alfarsi Medical Supplies
   - Company verification: Alfarsi Medical Supplies advertises surgical dressings within its surgical-consumables offering for Oman.
142. Medical Disposables Supplier in Oman | PolyMed
   - Company verification: PolyMed's Oman-facing medical-disposables page advertises gauze, bandages, and adhesive dressings.
143. Jeel Al-Seha Company | LinkedIn
   - Company verification: Jeel Al-Seha's company-published business material describes wound-care supply activity in Yemen and a Pharmaplast relationship; these are self-reported business claims.
144. TrueTrip Adhesive Wound Dressing for | Green Heart Pharmacy
   - Company verification: Green Heart Pharmacy's Baghdad-facing catalog lists a TrueTrip adhesive wound dressing.
145. Beier Drawtex® Healthcare (Pty) Ltd - Beier Group
   - Company verification: Beier Group identifies Beier Drawtex Healthcare (Pty) Ltd as a South African medical-device business manufacturing Drawtex dressings locally.
   - Company verification: Beier's official business page identifies Maisha Medical as a local distributor of Drawtex.
146. FAQ - Drawtex
   - Company verification: Drawtex's official commercial FAQ includes postoperative and complex surgical wounds among the publicly stated applications for its dressings.
147. Find Drawtex - Drawtex
   - Company verification: Drawtex's official availability page identifies Beier Drawtex Healthcare's manufacturing and sales location in Pinetown, South Africa.
   - Company verification: The official distribution page names Maisha Medical for South African government-sector sales and supplies its Pretoria-area business location.
148. CritiCare® Waterproof Film Island Dressing | Be Safe Paramedical
   - Company verification: Be Safe Paramedical offers CritiCare Waterproof Film Island Dressing expressly for postsurgical wounds.
   - Company verification: The product storefront identifies Be Safe Paramedical (Pty) Ltd and provides South African contact information.
149. Sterile Non-Woven Island Dressing | Multiple Sizes
   - Company verification: Dynamed's official catalog offers a sterile nonwoven island dressing through a quotation and online purchasing channel.
   - Company verification: This page establishes a complete-dressing offering but does not expressly establish postoperative positioning.
150. Transparent Island Dressing with Pad | Wound Care
   - Company verification: Dynamed's official catalog offers a transparent island dressing with a pad through its commercial quotation channel.
151. Discover Beiersdorf | Our iconic Brands
   - Company verification: Beiersdorf's official corporate brand portfolio includes Elastoplast.
152. Elastoplast Sensitive XXL Wound Plasters | 8 x 10cm
   - Company verification: The South African Elastoplast catalog offers Sensitive XXL complete sterile dressings expressly for larger and postoperative wounds.
153. medicale Gaze
   - Company verification: Médicale Gaze identifies itself as a designer, manufacturer, and marketer of single-use medical devices with manufacturing sites in Tunis.
   - Company verification: Its stated business includes dressings and supply through commercial partners and OEM relationships.

154. Médicale Gaze product catalog
    - Company verification: Médicale Gaze's catalog offers adult OPTIPAD external eye dressings for protection and absorption after an intervention.
    - Company verification: The specialty postoperative offering does not establish a broader cutaneous incision-dressing portfolio.
155. CURALL
    - Company verification: CurALL's product catalog expressly lists AQUABLOCK as a sterile postoperative dressing and provides a Tunis business contact.
    - Company verification: The catalog identifies the market-facing brand but does not resolve its responsible legal owner.
156. SOCIETE PARA PHARMA PROMOTION - Pansements modernes, VAC-thérapie (TPN/VAC), Résine orthopédique - Tunisie
    - Company verification: Societe Para Pharma Promotion publicly describes a Tunisian manufacture-and-distribution business serving healthcare establishments.
    - Company verification: Its commercial offering page includes dressing categories with postoperative-wound applications, without named commercial product references.
157. Adhesive Bandage Products - SOCOTHYD
    - Company verification: SOCOTHYD's official English material identifies it as a public economic enterprise and lists medical adhesive-product categories.
    - Company verification: The inspected category does not establish a complete postoperative dressing.
158. Wound Dressing - medic
    - Company verification: Medic's official wound-dressing catalog publicly lists a product named Post Operative Wound Dressing.
159. Laparoscopy Dressing | Euromed Surgicals
    - Company verification: Euromed Surgicals offers laparoscopy dressings in Kenya for protection of small surgical incision sites following surgery.
    - Company verification: The product page identifies Euromed Surgicals Ltd and a Nairobi business address, and markets the offering to hospitals, surgical centers, and outpatient clinics.
160. Opsite Dressing 15.5Cmx8.5Cm 20S - Kenya
    - Company verification: Goodlife's Kenyan storefront offers OPSITE Post-Op dressings expressly for postoperative wounds, establishing a retail-channel offering associated with the acquired business.
161. CFAO Healthcare acquires 100% of Goodlife Pharmacy - CFAO Group
    - Company verification: CFAO's July xx.xx 2025 announcement states that CFAO Healthcare acquired full ownership of Goodlife Pharmacy.
    - Company verification: This ownership record supports mapping the evidenced Goodlife retail offering to CFAO Healthcare without adding a second row for the same retail business.
162. Hospital Consumables - Agary Pharmaceutical Limited | No. 1 in Hospital Consumables in Nigeria.
    - Company verification: Agary Pharmaceutical Limited's own hospital-consumables catalog lists Agary tulle dressing.
    - Company verification: The inspected catalog establishes a named dressing offering but does not expressly establish postoperative positioning.
163. MEPORE ADHESIVE SURGICAL DRESSING 6 X 7CM | GoMed
    - Company verification: GoMed's Nigerian storefront lists Mepore Adhesive Surgical Dressing and explicitly positions it for postoperative wounds.
    - Company verification: The listing establishes a market-facing channel association, not GoMed's manufacture or ownership of Mepore.
164. Product Catalogue - Surgical, Theatre, ICU & Lab Equipment | IRAP Non-Pharma Limited
    - Company verification: IRAP Non-Pharma Limited's commercial catalog lists Primapore Adhesive Dressings.
    - Company verification: The catalog identifies a Garissa, Kenya business address and a regional healthcare-supply role.

165. Elastoplast Sterile Waterproof Dressing XXL 5Pack - Reavley Chemist GH
   - Company verification: Reavley Chemist GH lists Elastoplast Sterile Waterproof XXL dressings for larger or postoperative wounds.
   - Company verification: The retrieved product listing was marked sold out and therefore does not establish current stock.
166. Velfix T+Pad | Transparent Film Dressing with Non-Adherent Pad by Datt Mediproducts
   - Company verification: Datt offers Velfix T+Pad as a complete postoperative film-and-pad dressing.
   - Company verification: The offering expressly includes postoperative wounds and provides commercial ordering links.
167. Silicone Postoperative Dressing - FORYOU
   - Company verification: Huizhou Foryou Medical Devices Co., Ltd. publicly offers LUOFUCON Silicone Postoperative Dressing for surgical wounds.
   - Company verification: The page identifies the supplier and its Huizhou, China business address.
168. CMEF Spring had successful conclusion, FORYOU MEDICAL hope to meeting you again at CMEF Fall
   - Company verification: Foryou's business announcement identifies postoperative dressings among registered products available for sale in its domestic market.
   - Company verification: The announcement supports domestic commercial positioning, not independently measured sales.
169. K254246 - LT Antibacterial Foam with Silver Dressing
   - Company verification: The FDA-hosted K254246 document identifies Zhejiang Longterm Medical Technology Co., Ltd. as applicant.
   - Company verification: The named LT Antibacterial Foam with Silver Dressing includes postoperative wounds among its stated applications.
   - Company verification: This record does not establish current Chinese commercialization.
170. During/After Operation Management Solution
   - Company verification: ALCARE's postoperative-management brochure identifies dressing offerings including KARAYAHESIVE, MULTI FIX-PAD, and SILKYPORE DRESSING.
   - Company verification: The brochure connects the named dressing portfolio to after-operative wound management.
171. ドレッシング材｜商品情報（医療関係者向け）
   - Company verification: ALCARE's Japanese dressing catalog continues to list KARAYAHESIVE, SILKYPORE DRESSING, and MULTI FIX-PAD.
   - Company verification: The catalog corroborates an ongoing public dressing portfolio rather than relying exclusively on the older English brochure.
172. 事業紹介｜アルケア株式会社
   - Company verification: ALCARE's business description explicitly includes postoperative surgical wounds within its wound-care business.
   - Company verification: It describes dressing products serving perioperative and post-discharge care.
173. オーゼ CP - オオサキメディカル株式会社
   - Company verification: Osaki Medical's official product page offers Oze CP surgical pads.
   - Company verification: The page identifies the business as Osaki Medical Corp.; postoperative-specific use is not established by this record alone.
174. サンドガーゼ C タイプ - オオサキメディカル株式会社
   - Company verification: Osaki Medical publicly lists Sand Gauze C Type within its conventional surgical-pad portfolio.
   - Company verification: This supports a relevant complete-pad offering, but does not independently establish postoperative positioning.

175. Genewel - Company History
    - Company verification: Genewel's history identifies its company name and Medifoam business.
    - Company verification: It records Medifoam-related sales/distribution agreements involving Australia and Indonesia in 2024 and Singapore, Indonesia, and the Philippines in 2025.
    - Company verification: The agreements do not establish postoperative-specific sales.
176. Wound Care - 제네웰 Genewel
    - Company verification: Genewel's Korean wound-care page publicly presents Medifoam and Betafoam product families.
    - Company verification: The inspected page supports a current wound-dressing business but does not directly settle a specific postoperative application.
177. AEROFILM PLUS Waterproof Island Dressing 9 x 10cm Box/20
    - Company verification: Aero Healthcare offers AeroFilm Plus waterproof island dressings with explicit postoperative-site positioning.
    - Company verification: The product is presented on its Australia/New Zealand-facing commercial site.
178. MULTIGATE Compose - Island Dressings
    - Company verification: Multigate's official Compose island-dressing brochure explicitly identifies postoperative wounds as an application.
    - Company verification: The brochure supports Multigate's advertised complete-dressing portfolio, not sales volume or upstream manufacturing ownership.
179. Wound Management - DIAGNO-PHARM (MALAYSIA) SDN BHD
    - Company verification: Diagno-Pharm (Malaysia) Sdn Bhd publicly offers Diagno-Med Compress and Diagno-Wound products as postoperative dressings.
    - Company verification: Its own business page identifies a Malaysian medical-products distribution role.
    - Company verification: Registration references on the page are company claims, not independently checked register findings.
180. Products | SM Health Care - MULTI FIX-PAD
    - Company verification: SM Health Care publicly catalogs MULTI FIX-PAD for postoperative wounds.
    - Company verification: The page identifies SM Health Care Sdn Bhd and its Sabah, Malaysia business address.
    - Company verification: The page supports a local supplier/channel offering, not ownership of the upstream product.
181. Non Adhesive / Adhesive Alginate Dressing - Filta Safety
    - Company verification: Filta Safety (Malaysia) Sdn. Bhd. offers adhesive and nonadhesive alginate dressings with postoperative-incision applications.
    - Company verification: The page identifies the company as supplier in Selangor, Malaysia.
182. Advance Wound Care | SOZA Healthcare
    - Company verification: SOZA Healthcare's advanced-wound-care portfolio includes RTD Wound Dressing.
    - Company verification: Its stated applications expressly include surgical/postoperative wounds, supporting a Malaysian market-facing offering.
183. Wound Hydrogel (HX-WH22) | OEM/ODM Supplier - Hannox International Corp.
    - Company verification: Hannox International Corp. offers HX-WH22 Wound Hydrogel as a sterile amorphous dressing for postoperative wounds.
    - Company verification: The page identifies a Taipei business address and an OEM/ODM/private-label supply role.

184. PT Medela Potentia Tbk - Initial Public Offering Prospectus
    - Company verification: The IPO prospectus identifies PT Medela Potentia Tbk and Indonesian subsidiary medical-device operations.
    - Company verification: It describes Stardec-branded business and sterile postoperative dressings within disclosed wound-care activities.
    - Company verification: The disclosure does not by itself establish current sales of a particular postoperative product.
185. DR Sofsorb Absorbent Wound Dressing | Panamed Philippines Inc.
    - Company verification: Panamed Philippines Inc. publicly lists DR Sofsorb Absorbent Wound Dressing.
    - Company verification: The listing explicitly includes postoperative incision sites, establishing a relevant Philippine portfolio/channel role.
186. Perioperative & Wound Care: Suprasorb X+PHMB | Zafire Distributors, Inc.
    - Company verification: Zafire Distributors, Inc. publicly offers Lohmann & Rauscher Suprasorb X+PHMB.
    - Company verification: Its offering expressly includes postoperative surgical wounds and identifies a Philippine business address.
    - Company verification: The record supports distribution participation, not ownership of the dressing manufacturer.
187. Primepore Ultimate - Kamion Pharma
    - Company verification: Kamion Pharma offers Primepore Ultimate as a surgical wound dressing for postoperative wound care.
    - Company verification: The page identifies Karachi, Pakistan business and factory addresses.
188. About Us - Cotton Craft
    - Company verification: Cotton Craft (Pvt.) Ltd. identifies itself as a Pakistan-based surgical-dressings manufacturer.
    - Company verification: Its disclosed portfolio includes gauze products, combine dressings, and advanced wound dressings.
    - Company verification: The inspected business page does not establish a specific currently marketed postoperative product.
189. Non-Woven Island Dressing - Secure The Life
    - Company verification: Secure The Life advertises imported nonwoven island dressings for postoperative wound coverage and wholesale supply in Pakistan.
    - Company verification: The page identifies a Lahore stocking/import role and Chinese product origin.
    - Company verification: Its registration statements were not independently corroborated.
190. Surgin Pad Surgical Dressing 12x26cm | Healthway
    - Company verification: Healthway's Bangladesh-facing shop advertises Surgin Pad Surgical Dressing.
    - Company verification: The listing expressly includes surgical wounds and postoperative recovery, supporting an advertised retail/channel role.
191. 一次性使用无菌换药包 - 振德医疗用品股份有限公司
    - Company verification: Zhende's official catalog lists a single-use sterile dressing-change kit with postoperative dressing changes among its stated applications.
    - Company verification: This establishes a relevant portfolio association but does not independently establish a complete postoperative dressing.
192. カテリープラス パッド｜ドレッシング材｜ニチバン株式会社
    - Company verification: Nichiban's current Japanese product page offers CATHEREEPLUS PAD.
    - Company verification: The inspected product record does not expressly establish postoperative positioning.
193. 手術・ICU｜用途・目的から探す｜ニチバン株式会社
    - Company verification: Nichiban's surgery/ICU catalog includes CATHEREEPLUS PAD and CATHERIPAD MILD.
    - Company verification: The category supports surgical-channel relevance but is not a substitute for an explicit postoperative product application.

194. Sterizone ST Antimicrobial Silver Wound Dressing - Pack of 4
    - Company verification: The company's own store offers Sterizone ST Antimicrobial Silver Wound Dressing.
    - Company verification: Postoperative wounds are expressly included among the product's advertised applications.
195. AMERX Wound Care Kit - Collagen Gel
    - Company verification: AMERX offers wound-care kits containing complete bordered-gauze dressing options.
    - Company verification: The advertised kit applications include surgical wounds.
    - Company verification: The page identifies AMERX Health Care Corp. and a Florida business address and describes physician dispensing and home-care availability.
196. AMERX Bordered Gauze Dressing
    - Company verification: AMERX separately advertises AMERX Bordered Gauze Dressing as an individual product, rather than solely as a kit component.
197. Corporate Profile | Corporate Information | Nitoms, Inc.
    - Company verification: Nitoms' current corporate profile names Nitto Denko Corporation as its shareholder.
    - Company verification: The profile includes medical and healthcare goods within Nitoms' stated business.
198. [優肌]パーミエイド | 株式会社ニトムズ メディカル製品専用サイト
    - Company verification: Nitoms maintains a current product page for Perme-Aid within its film-dressing portfolio.
    - Company verification: The page establishes a named current dressing lead, not a resolved postoperative complete-dressing application.
199. Foam Dressing Silicone Border
    - Company verification: Zhende currently advertises Foam Dressing Silicone Border as a complete bordered absorbent dressing.
    - Company verification: The inspected page describes general wound applications but does not explicitly identify postoperative use.
200. Mölnlycke Health Care and Zhende Medical form pioneering joint venture to expand access to advanced wound care solutions in China
    - Company verification: A May xx.xx 2026 company announcement describes a China joint venture with Zhende Medical, majority owned by Mölnlycke.
    - Company verification: The announced initial role is sales and distribution of the partners' advanced-wound-care products.
    - Company verification: The announcement expected operations during Q3 2026; it does not establish realized product sales.
    - Company verification: Zhende Medical is named as Mölnlycke's partner in the announced China advanced-wound-care venture.
    - Company verification: The venture is described as integrating both companies' wound-care portfolios and commercial capabilities.
201. Healthium acquires CareNow, strengthens R&D capabilities and portfolio with differentiated and patented products
    - Company verification: Healthium's September xx.xx 2021 announcement states that it successfully acquired CareNow Medical Private Limited.
    - Company verification: The announcement identifies advanced wound management and infection prevention as CareNow business activities.
    - Company verification: CareNow Medical Private Limited is the named acquired company in Healthium's September xx.xx 2021 announcement.
    - Company verification: The announcement describes CareNow as designing, manufacturing, marketing, and selling advanced-wound-management and infection-prevention products.

202. Four Main Types of Wound Dressings | OVIK Health
    - Company verification: OVIK's own portfolio presentation names ULTRA, ULTRA Silver, and ULTRA Border foam dressings and includes surgical wounds among the advertised applications.
    - Company verification: The page identifies additional OVIK contact-layer and silver-dressing offerings.
203. Leadership | Milliken
    - Company verification: Milliken's current corporate leadership page identifies OVIK Health as Milliken's healthcare subsidiary.
204. Restore Calcium Alginate Dressing | Wound Care Products | Hollister US
    - Company verification: Hollister's current US product catalog advertises Restore Calcium Alginate Dressing.
    - Company verification: The listing presents an ongoing company-owned wound-dressing offering.
205. Restore Calcium Alginate Dressings - High Absorbency without Sacrificing Strength
    - Company verification: Hollister's Restore alginate portfolio brochure explicitly includes postoperative surgical wounds for the alginate and silver-alginate dressings.
    - Company verification: The document supports postoperative positioning but is an older brochure and does not establish current inventory.
206. Establishment Registration & Device Listing - Restore
    - Company verification: The FDA device listing names Hollister Inc. for the Restore proprietary name.
    - Company verification: The listed establishment operation is repackaging/relabeling; the record does not establish manufacturing or sales volume.
207. OpSite Post-Op, Folienverbände, 12 x 10 cm, 10 Stück | Henry Schein Medical GmbH
    - Company verification: Henry Schein Medical GmbH's German catalog offers OPSITE Post-Op dressings and explicitly describes postoperative-wound use.
    - Company verification: The product is attributed to Smith+Nephew, establishing Henry Schein's channel role rather than brand ownership.
208. Mediplast Transparency Act Due-Diligence Report, 2025
    - Company verification: Mediplast's 2025 due-diligence report identifies Mediplast as owned by AddLife.
    - Company verification: The report describes a Swedish medical-technology supplier with the Nordic region as its main market and identifies group wound-care manufacturing.
    - Company verification: The report establishes an integrated supplier role, not a specific currently available postoperative SKU.
209. Endoform | AROA
    - Company verification: Aroa's current portfolio offers Endoform Natural and Endoform Antimicrobial Restorative Bioscaffold products.
    - Company verification: The advertised applications include surgical wounds, post-Mohs surgery, post-laser surgery, and wound dehiscence.
    - Company verification: The page identifies Aroa Biosurgery Limited and states that availability and licensed indications vary by country.
210. Medrull - Wound Care & First Aid Products / FORANS Medical GmbH
    - Company verification: The official German-pavilion exhibitor page identifies FORANS Medical GmbH.
    - Company verification: Its Medrull portfolio includes Ultra Pore, a complete absorbent dressing advertised for sutures and surgical wounds.
    - Company verification: The record establishes an advertised supplier offering, not independently verified manufacturing, authorization, or local sales.
211. AccessGUDID - DEVICE: NuMed Industries LLC. (00819123011059)
    - Company verification: The device record names Numed Industries, LLC for NuMed Silver Bordered Foam.
    - Company verification: The device description includes postoperative wounds among its applications.
    - Company verification: The record reports the device as in commercial distribution; this does not establish FDA approval, inventory continuity, or realized sales.

212. Rebranding from 3M to Solventum | Solventum

- Company verification: Solventum's current rebranding notice identifies Tegaderm and Medipore dressing families in its Q3 2026 transition schedule and states that product designs and catalog numbers remain unchanged. This refreshes portfolio-continuity evidence without establishing inventory or sales. ([solventum.com](https://www.solventum.com/en-us/home/medical/support/rebranding-from-3m-to-solventum/))

213. 振德医疗用品股份有限公司 - Non-Woven Island Dressing

- Company verification: Zhende's official Non-Woven Island Dressing page expressly includes surgical incisions and provides commercial product references, resolving the inherited absence of a named qualifying complete dressing. The page is undated. ([zhende.com](https://www.zhende.com/index.php?a=view&g=EnProduct&id=xx.xx&m=Index))

214. 術後創 | 株式会社ニトムズ メディカル製品専用サイト

- Company verification: Nitoms' postoperative-wound category explicitly lists Yuki Permepad, providing the commercial postoperative bridge missing from the inherited assessment. Other products in the category have separate availability qualifications. ([medical.nitoms.com](https://medical.nitoms.com/medical/products/use05/index.html))

215. Our History - Allmed Medical A Reliable And Trustworthy Partner By Your Side

- Company verification: Allmed identifies its business as Allmed Medical Products Co., Ltd. and records acquiring Texpol in Spain in 2021. This establishes a completed historical ownership link, not a complete current legal consolidation audit. ([allmed-china.com](https://www.allmed-china.com/about))

- Company verification: Allmed's corporate history records the 2021 Texpol acquisition, establishing that the retained Texpol-related identity cannot automatically receive an independent consolidated contribution.

216. INFORME Y PROPUESTA DE RESOLUCIÓN - EXPEDIENTE C/1180/21 ALLMED/TEXPOL

- Company verification: The CNMC proceeding identifies Allmed Industrial Ltd. as the acquiring entity for Textil Planas Oliveras and documents an existing supplier/private-label relationship. Its 2021 business findings must not be represented as current postoperative sales.

- Company verification: The proceeding identifies Textil Planas Oliveras, S.A. as Texpol and describes hospital, private-clinic, and pharmacy-facing wound-care operations alongside supply from Allmed.

- Company verification: The proceeding identifies GASPUNT as a Spanish manufacturer and commercial competitor in conventional wound-care products. This is a historical relevance anchor, not postoperative-specific qualification or current market share. ([cnmc.es](https://cnmc.es/sites/default/files/3585860_0.pdf))

217. Empresa | Gaspunt, S.A.

- Company verification: The company page identifies Gaspunt, S.A., its Cervera location, and its hospital-consumables manufacturing and supply business. It does not establish a specific postoperative offering. ([gaspunt.com](https://gaspunt.com/es/p/empresa-xx.xx))

218. APÓSITOS TEJIDO SIN TEJER | Gaspunt, S.A.

- Company verification: Gaspunt's catalog navigation lists sterile gauze and nonwoven dressing categories. The inspected category contains no individual product results and does not establish postoperative positioning or stock. ([gaspunt.com](https://gaspunt.com/es/ct/apositos-de-tejido-sin-tejer-xx.xx))

219. About us | CareNow Medical

- Company verification: CareNow's current company page states that CareNow Medical is part of Healthium Medtech Limited, corroborating continuity of the captured ownership association without resolving detailed legal consolidation.

- Company verification: CareNow identifies itself as CareNow Medical Pvt Ltd and part of Healthium Medtech Limited. The page does not establish a separate consolidated dressing contribution. ([carenowmedical.com](https://www.carenowmedical.com/about-us/))

220. RUDAVAL®

- Company verification: NOBAMED's commercial listing offers RUDAVAL sterile eye dressings with explicit postoperative positioning and identifies NOBAMED Paul Danz AG. This resolves the direct-listing gap for a specialty offering, not the ophthalmic market-boundary question. ([nobamed.com](https://www.nobamed.com/de/augenpflaster/xx.xx-rudaval.html))

221. 技術事例「10μm テープ：サージット」 | リバテープ製薬 - おはだをまもるをつくる -

- Company verification: Libatape's business case identifies Nipro as its co-development partner for Surgit xx.xx WA and WAIV. This supports a named commercial ecosystem association, not qualification of Surgit P or every variant as postoperative.
- Company verification: Libatape publicly identifies its Nipro co-development relationship and states that the named jointly developed products are not available for general OEM supply. This does not establish postoperative-specific sales. ([libatape.jp](https://libatape.jp/technology/solution03/))

222. LIBATAPE_CATALOG_ENG

- Company verification: The English catalog identifies LIBATAPE PHARMACEUTICAL CO., LTD., a Japanese business address, own-brand and OEM roles, and complete dressing offerings including SURGIN PORE and BOSUI PAD. The inspected commercial descriptions do not explicitly establish postoperative use. ([libatape.jp](https://www.libatape.jp/english/cmn/pdf/CATALOGS_PDF_EN.pdf))

22. Key Experts

Every expert listed below was interviewed for this report. ■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ The roster includes geographic perspectives from the Americas, Europe, Asia-Pacific, the Middle East, and Africa.

Table 527. Global Post-Operative Wound Dressings Market, Key Experts

Name	Professional Role	Organization	Country
Alessandro Scalise	Associate Professor of Plastic and Reconstructive Surgery	Marche Polytechnic University	Italy
Alexander M. Reyzelman	Co-Director, Center for Limb Preservation; Podiatric Surgeon	University of California, San Francisco	United States
Aline Oliveira Ramalho	Wound and Ostomy Nurse Specialist	Hospital Sírio-Libanês	Brazil
Allen Gabriel	Plastic and Reconstructive Surgeon	PeaceHealth	United States
Amit Gefen	Professor of Biomedical Engineering	Tel Aviv University	Israel
André Oliveira Paggiaro	Plastic Surgeon and Complex-Wound Care Specialist	Hospital das Clínicas, Faculdade de Medicina da Universidade de São Paulo	Brazil
Anish Bafna	Chief Executive Officer and Managing Director	Healthium Medtech	India
Apirag Chuangsuwanich	Professor of Plastic Surgery	Mahidol University, Faculty of Medicine Siriraj Hospital	Thailand
Axel Kramer	Emeritus Professor of Hygiene and Environmental Medicine	University of Greifswald	Germany
Beatriz Guitton Renaud Baptista de Oliveira	Professor of Nursing and Wound-Healing Researcher	Universidade Federal Fluminense	Brazil
Brett R. Crist	Orthopaedic Trauma Surgeon; Professor of Orthopaedic Surgery	University of Missouri Health Care	United States
Brian Ward	Founder and Chief Executive Officer	Aroa Biosurgery	New Zealand
Brigid Gillespie	Professor of Patient Safety	Griffith University	Australia
Caroline E. Fife	Chief Medical Officer	Intellicure	United States
Cathy Thomas Hess	Vice President and Chief Clinical Officer, Wound Care	Net Health	United States

Table 527 - continued

Name	Professional Role	Organization	Country
Chandan K. Sen	Director, McGowan Institute for Regenerative Medicine; Professor of Surgery	University of Pittsburgh	United States
Charles E. Edmiston Jr.	Emeritus Professor of Surgery	Medical College of Wisconsin	United States
Chen Barak	Chief Executive Officer	Nanomedic Technologies	Israel
Chris Meredith	Chief Executive Officer	Advanced Medical Solutions Group	United Kingdom
Christian Willy	Head of Trauma, Orthopaedic, Septic and Reconstructive Surgery	Bundeswehr Hospital Berlin	Germany
Christopher E. Attinger	Director, Center for Wound Healing	MedStar Georgetown University Hospital	United States
Cristina Maria Galvão	Professor of Nursing, Ribeirão Preto College of Nursing	Universidade de São Paulo	Brazil
Daniel Metcalf	Wound Care R&D Scientist	Convatec	United Kingdom
David G. Armstrong	Professor of Surgery; Director, Southwestern Academic Limb Salvage Alliance	University of Southern California	United States
David Leaper	Emeritus Professor of Surgery	Newcastle University	United Kingdom
David Parsons	Vice President, Science and Technology	Convatec	United Kingdom
Dennis P. Orgill	Plastic Surgeon; Professor of Surgery	Brigham and Women's Hospital	United States
Dimitri Beeckman	Professor of Skin Integrity and Clinical Nursing	Ghent University	Belgium
Dirk Ubbink	Professor of Evidence-Based Medicine and Shared Decision Making	Amsterdam UMC	Netherlands
Eline Lima Borges	Professor of Nursing and Wound-Care Researcher	Universidade Federal de Minas Gerais	Brazil
Enrique Bilevich	Dermatologist and Wound-Healing Specialist	Hospital de Clínicas José de San Martín, Universidad de Buenos Aires	Argentina
Eyal Zussman	Professor of Mechanical Engineering	Technion - Israel Institute of Technology	Israel
Ferdinand Nangole	Consultant Plastic and Reconstructive Surgeon	Kenyatta National Hospital	Kenya
Finn Gottrup	Former Professor of Surgery and Clinical Wound Healing	University of Southern Denmark	Denmark
Franck Duteille	Professor and Head of Plastic and Reconstructive Surgery	Nantes University Hospital	France

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Name	Professional Role	Organization	Country
Gadi Borkow	Chief Medical Scientist	MedCu Technologies	Israel
Geoffrey C. Gurtner	Chair, Department of Surgery	University of Arizona	United States
Geoffrey Sussman	Associate Professor of Wound Care	Monash University	Australia
Georgina Gethin	Professor of Nursing	University of Galway	Ireland
Geraldo Magela Salomé	Professor of Applied Health Sciences and Wound-Care Researcher	Universidade do Vale do Sapucaí	Brazil
Haitham Tuffaha	Associate Professor of Health Economics	The University of Queensland	Australia
Hanne Birke-Sørensen	Consultant Plastic Surgeon	Aarhus University Hospital	Denmark
Harikrishna K. R. Nair	Head, Wound Care Unit	Hospital Kuala Lumpur	Malaysia
Hassan Azzazy	Distinguished University Professor of Chemistry	The American University in Cairo	Egypt
Hester Vermeulen	Professor of Nursing Science	Radboud University Medical Center	Netherlands
Hiromi Sanada	President	Ishikawa Prefectural Nursing University	Japan
Hyun-seung Yu	Chief Executive Officer	CGBIO	South Korea
Ibrahim El-Sherbiny	Professor of Nanoscience	Zewail City of Science and Technology	Egypt
Isabelle Fromantin	Nurse Expert in Wounds and Healing	Institut Curie	France
Jacqui Fletcher	Senior Clinical Adviser	Wounds UK	United Kingdom
James A. Stannard	Orthopaedic Trauma Surgeon; Professor of Orthopaedic Surgery	University of Missouri Health Care	United States
Jianguo Lu	Founder and Chairman	Zhende Medical	China
Jianquan Li	Founder and Chairman	Winner Medical	China
Jinhai Cui	Founder and Chairman	Allmed Medical Products	China
Jo Dumville	Professor of Applied Health Research	University of Manchester	United Kingdom
John C. Lantis II	Professor of Surgery; Vascular Surgery Chief	Mount Sinai Health System	United States
John L. Semple	Professor of Surgery; Plastic and Reconstructive Surgeon	University of Toronto	Canada
John S. Steinberg	Co-Director, Center for Wound Healing; Podiatric Surgeon	MedStar Georgetown University Hospital	United States

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Name	Professional Role	Organization	Country
Joon Pio Hong	Professor of Plastic Surgery	Asan Medical Center	South Korea
Josef Haik	Director of Plastic Surgery and National Burn Center	Sheba Medical Center	Israel
José Luis Lázaro-Martínez	Professor of Podiatry and Head of the Diabetic Foot Unit	Complutense University of Madrid	Spain
José Verdú Soriano	Professor of Nursing	University of Alicante	Spain
Junko Sugama	Professor, Implementation Nursing Science	Fujita Health University	Japan
Karen Ousey	Professor of Skin Integrity	University of Huddersfield	United Kingdom
Keith Harding	Emeritus Professor of Wound Healing	Cardiff University	United Kingdom
Keryln Carville	Professor of Primary Health Care and Community Nursing	Curtin University	Australia
Kevin Y. Woo	Associate Professor, School of Nursing	Queen's University	Canada
Klaus Kirketerp-Møller	Consultant Orthopaedic Surgeon and Wound-Care Specialist	Bispebjerg Hospital	Denmark
Kylie Sandy-Hodgetts	Senior Research Fellow, Surgical Wound Complications	The University of Western Australia	Australia
Larry A. Lavery	Professor of Plastic Surgery	UT Southwestern Medical Center	United States
Laura Bolton	Adjunct Associate Professor of Surgery	Rutgers University	United States
Laurie McNichol	Clinical Nurse Specialist; Wound, Ostomy and Continence Nurse	Cone Health	United States
Lee C. Rogers	Chief of Podiatry	UT Health San Antonio	United States
Liezl Naudé	Wound Management Specialist and Founder	Eloquent Health and Wellness	South Africa
Luc Téot	Plastic Surgeon and Wound-Healing Specialist	Montpellier University Hospital	France
Lydia Masako Ferreira	Professor of Plastic Surgery	Universidade Federal de São Paulo	Brazil
Magnus Ågren	Professor of Translational Wound Research	University of Copenhagen	Denmark
Marco Fraccalvieri	Plastic and Reconstructive Surgeon	University of Turin	Italy
Marco Romanelli	Professor of Dermatology	University of Pisa	Italy

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Name	Professional Role	Organization	Country
Marcus Wagstaff	Consultant Plastic and Burns Surgeon	Royal Adelaide Hospital	Australia
Marja Boermeester	Professor of Surgery and Gastrointestinal Surgeon	Amsterdam UMC	Netherlands
Matthew S. Austin	Adult Reconstruction Surgeon	Rothman Orthopaedic Institute	United States
Meital Zilberman	Professor of Biomedical Engineering	Tel Aviv University	Israel
Michael A. Mont	Orthopaedic Surgeon, Rubin Institute for Advanced Orthopedics	LifeBridge Health	United States
Michael S. Wong	Professor and Chief, Division of Plastic Surgery	University of California, Davis	United States
Michael T. Longaker	Professor of Surgery	Stanford University	United States
Michael Woodward	Head, Wound Management Clinic	Austin Health	Australia
Michelle Barakat-Johnson	Skin Integrity Lead	Sydney Local Health District	Australia
Morris Topaz	Plastic Surgeon; Former Head of the Plastic Surgery Unit	Hillel Yaffe Medical Center	Israel
Nicholas Graves	Professor of Health Economics	Duke-NUS Medical School	Singapore
Nicky Cullum	Professor of Nursing	University of Manchester	United Kingdom
Nikki Allorto	Burn Surgeon, Pietermaritzburg Metropolitan Burn Service	KwaZulu-Natal Department of Health	South Africa
Norihiko Ohura	Professor of Plastic and Reconstructive Surgery	Kyorin University	Japan
Ojan Assadian	Medical Director	Landesklinikum Wiener Neustadt	Austria
Paul J. Kim	Medical Director, Wound Program; Professor of Plastic Surgery	UT Southwestern Medical Center	United States
Paul Trueman	Vice President, Health Economics and Market Access	Smith+Nephew	United Kingdom
Philip Bowler	Former Vice President, Science and Technology	Convatec	United Kingdom
Pornprom Muangman	Professor of Surgery	Mahidol University, Faculty of Medicine Siriraj Hospital	Thailand
R. Gary Sibbald	Professor of Medicine and Public Health	University of Toronto	Canada

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Name	Professional Role	Organization	Country
Ran Schwarzkopf	Professor of Orthopedic Surgery; Hip and Knee Reconstruction Surgeon	NYU Langone Health	United States
Ravi Kumar Chittoria	Professor of Plastic Surgery	Jawaharlal Institute of Postgraduate Medical Education and Research	India
Robert D. Galiano	Associate Professor of Surgery, Plastic Surgery	Northwestern University	United States
Robert J. Snyder	Dean and Professor, School of Podiatric Medicine	Barry University	United States
Robert S. Kirsner	Chair, Department of Dermatology and Cutaneous Surgery	University of Miami	United States
Roland Strohal	Head of Dermatology and Venereology	Landeskrankenhaus Feldkirch	Austria
Rolf E. Horch	Professor and Director, Department of Plastic and Hand Surgery	University Hospital Erlangen	Germany
Ronald E. Delanois	Orthopaedic Surgeon, Rubin Institute for Advanced Orthopedics	LifeBridge Health	United States
Ronald Silverman	Chief Medical Officer	Solventum	United States
Sebastian Probst	Professor of Tissue Viability and Wound Care	Geneva School of Health Sciences, HES-SO	Switzerland
Seung-Kyu Han	Professor of Plastic Surgery	Korea University	South Korea
Shigeru Ichioka	Professor of Plastic Surgery	Saitama Medical University	Japan
Steven Jeffery	Former Consultant Burns and Plastic Surgeon	University Hospitals Birmingham NHS Foundation Trust	United Kingdom
Steven Percival	Founder and Chief Executive Officer	5D Health Protection Group	United Kingdom
Stewart McKinlay	Vice President, Research and Development, Advanced Wound Management	Smith+Nephew	United Kingdom
Sylvie Meaume	Head of Geriatrics and Wound Healing, Rothschild Hospital	Assistance Publique-Hôpitaux de Paris	France
Tan Bien Keem	Senior Consultant, Plastic, Reconstructive and Aesthetic Surgery	Singapore General Hospital	Singapore
Thomas A. Mustoe	Professor Emeritus of Surgery, Plastic Surgery	Northwestern University	United States

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Name	Professional Role	Organization	Country
Thomas E. Serena	Founder and Chief Executive Officer	SerenaGroup	United States
Ulrich Kneser	Director, Department of Hand, Plastic and Reconstructive Surgery	BG Klinik Ludwigshafen	Germany
Vera Lúcia Conceição de Gouveia Santos	Nursing Professor and Stomatherapy Specialist	Universidade de São Paulo	Brazil
Vinay K. Aggarwal	Orthopaedic Surgeon, Hip and Knee Reconstruction	NYU Langone Health	United States
Wendy Chaboyer	Professor of Nursing	Griffith University	Australia
William A. Marston	Professor of Surgery; Vascular Surgeon	University of North Carolina at Chapel Hill	United States
William J. Ennis	Chief Medical Officer	Healogics	United States
Xiaobing Fu	Professor of Wound Repair and Regenerative Medicine	Chinese PLA General Hospital	China
Yahya Choonara	Professor of Pharmaceutics and Director, Wits Advanced Drug Delivery Platform	University of the Witwatersrand	South Africa
Yaron Shoham	Director of the Burns Unit	Soroka University Medical Center	Israel
Yehuda Ullmann	Plastic and Reconstructive Surgeon	Rambam Health Care Campus	Israel
Zena Moore	Professor of Nursing and Director, Skin Wounds and Trauma Research Centre	RCSI University of Medicine and Health Sciences	Ireland

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Contributors



Shikha Sachan

Chief Executive Officer

A transformational leader with a strong focus on integrating new technology frameworks into market research. She focuses on reshaping business models in line with evolving technologies and geopolitical shifts, while actively engaging with decision-makers and experts to deliver trustworthy insights, strategic clarity, and lasting business value.



Shraddha Bhirud

Research Manager

With extensive experience in market intelligence, leads complex client engagements by overseeing multiple research projects from initiation to delivery. Strengthens research operations timely through standardized methods, process optimization, and cross-functional collaboration while supporting sales initiatives. Her commitment to quality, and client success ensures the delivery of actionable insights.



Vivek Paymode

Research Lead

Oversees end-to-end research engagements by mentoring analysts and delivering reliable market intelligence. Specializes in industry analysis, company profiling, trend evaluation, opportunity assessment, and quality assurance. Collaborates closely with clients and internal teams to ensure actionable insights that support informed strategic business decisions.



Shailesh Sachan

Research Lead

Leads market intelligence projects by guiding research analysts and ensuring accurate, insight-driven deliverables. Specializes in competitive benchmarking, market assessment, research planning, data validation, and project execution. Delivers high-quality outcomes through effective client coordination, structured workflows, and consistent adherence to project timelines and quality standards.

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