Germany Tissue Engineered - Skin Substitutes Market Outlook to 2020

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2 Introduction

Medical Equipment Market Reports are the ideal guide for anyone wishing to understand their market better in terms of revenues, unit sales, distributors and competitors.

2.1 What Is This Report About?

This report provides an overview and the following information related to the country, various categories, distribution share and competitive landscape in the market:

1. Comprehensive data related to the market revenue, unit sale, average price, company share and distribution share.
2. Corporate-level profiles of key companies operating in the Tissue Engineered - Skin Substitutes market, which includes a brief overview of the company. The selection of the companies is based on their operational presence.
3. A list of key products under development by different companies. The selection of this list is based on the territory in which these products are being clinically investigated.
4. Key news and deals related to the Tissue Engineered - Skin Substitutes market.

2.2 Tissue Engineered - Skin Substitutes Market Segmentation

Tissue Engineered - Skin Substitutes market is segmented as described below, in this report:

- **Tissue Engineered - Skin Substitutes includes segments such as**
  1. Synthetic Skin Substitutes
  2. Biosynthetic Skin Substitutes
  3. Biologic Skin Substitutes
    - Biologic Skin Substitutes includes sub-segments such as Allograft and Xenograft.
      - Allograft includes sub-segments such as Allograft Cellular and Allograft Acellular.
      - Xenograft include sub-segment such as Xenograft Acellular.
2.3 Definitions of Markets Covered in the Report

**Tissue Engineered - Skin Substitutes**
Tissue engineering for wound care management is the use of mechanical and chemical processing of materials to manufacture products that may substitute or replace all or some components that make up a normal skin (e.g. epidermis and/or dermis, cells and matrix). They can be derived from human tissue (Autologous or Allogenic), non-human tissue (Xenographic), and a composite or Synthetic material. Acellular or cellular, Synthetic or Biological and may consist of a synthetic epidermis and a collagen-based dermis to encourage formation of new tissue. In products that have a synthetic epidermis, this may be a temporary wound covering. This category covers all types of skin substitutes mentioned above. This category consists of Synthetic skin substitutes, Biosynthetic skin substitutes, and Biological skin substitutes.

**Synthetic Skin Substitutes**
Synthetic skin substitutes are the Tissue engineered products which consist of biocompatible polymer matrix. One unit of Synthetic skin substitute refers to 100 sq. cm.

**Biosynthetic Skin Substitutes**
Tissue Engineered Biosynthetic skin substitutes products are a combination of biological and biocompatible polymer matrix. One unit of Biosynthetic skin substitute refers to 100 sq. cm.

**Biologic Skin Substitutes**
Tissue Engineered products for wound care management which are Biological in origin; includes Autograft, Allograft, and Xenograft. One unit of Biological skin substitute refers to 100 sq. cm.

**Allograft**
Tissue Engineered Allografts are the transplanted cells or tissues sourced from a genetically non-identical member of the same species. These are typically available in the form of surgical grafts or matrix. Allograft can be acellular or cellular. Acellular products (i.e., cadaveric human dermis in which cellular material is removed) have a matrix or scaffold made of materials such as hyaluronic acid, collagen, and fibronectin. Cellular Allograft products have living cells of fibroblasts and keratinocytes embedded in matrix.

Tissue Engineered Allografts include Allograft Cellular and Allograft Acellular.

**Xenograft Acellular**
Tissue Engineered Xenografts are derived from animal sources. The tissue material is processed to remove the cells. The products derived may consist of tissue scaffold or may be combined with synthetic material to create a composite product. Both biological and biosynthetic Xenografts, having either permanent or temporary application, are tracked under this segment. We have tracked only Xenograft Acellular and not Xenograft Cellular, as Xenograft Cellular are rarely used because of severe rejections and infections.
3 Tissue Engineered - Skin Substitutes Market, Germany

3.1 Tissue Engineered - Skin Substitutes Market, Germany, Revenue ($m), 2005-2013

Figure 1: Tissue Engineered - Skin Substitutes Market, Germany, Revenue ($m), USD Constant, Historic, 2005-2013

Source: GlobalData
<table>
<thead>
<tr>
<th>Category</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
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Source: GlobalData
3.2 Tissue Engineered - Skin Substitutes Market, Germany, Revenue ($m), 2013-2020

Figure 2: Tissue Engineered - Skin Substitutes Market, Germany, Revenue ($m), USD Constant, Forecast, 2013-2020

Source: GlobalData
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Source: GlobalData
3.2.1 Biologic Skin Substitutes Market, Germany, Revenue ($m), by Segment, 2005-2013

Figure 3: Biologic Skin Substitutes Market, Germany, Revenue ($m), USD Constant, Historic, 2005-2013

Source: GlobalData
<table>
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<tr>
<th>Segment</th>
<th>2005</th>
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<tr>
<td>Allograft</td>
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<td>Xenograft Acellular</td>
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Source: GlobalData
5 Appendix

The data and analysis within this report are driven by Medical eTrack. Medical eTrack gives you the key information required to drive sales, investment and deal-making activity in your business. It includes the following:

- 15,000+ data tables showing market size across more than 780 medical equipment segments and 15 countries, from 2005 and forecast to 2020
- 6,000+ primary expert interviews, conducted annually to ensure data and report quality
- 1,100+ medical equipment conference reports
- 1,000+ industry-leading reports per annum, covering growing sectors, market trends, investment opportunities and competitive landscape
- 600+ analysis reports, covering market and pipeline product analysis, by indication; medical equipment trends and issues, and investment and M&A trends worth over $3m
- 50,000+ medical equipment company profiles
- 2,000+ private, emerging and technology start-up company profiles
- 4,000+ company profiles of medical equipment manufacturers in China and India
- 2,000+ company profiles of medical equipment manufacturers in Japan
- 825+ companies’ revenue splits and market shares
- 1,100+ quarterly and annual medical equipment company financials
- 700+ medical equipment company SWOTs
- 14,900+ pipeline product profiles
- 18,700+ marketed product profiles
- 27,600+ clinical trials
- 20,000+ trial investigators
- 20,600+ new product patents
- 3,700+ reports on companies with products in development
- 21,500+ reports on deals in the medical equipment industry
- 1,300+ surgical and diagnostic procedures by therapy area
- 50+ key healthcare indicators by country

For more information or to receive a free demonstration of the service, please visit:
http://www.medicaletrack.com/ContactUs.aspx?Id=RequestDemo
5.1 Research Methodology

GlobalData’s dedicated research and analysis teams consist of experienced professionals with advanced statistical expertise and marketing, market research and consulting backgrounds in the medical devices industry.

GlobalData adheres to the codes of practice of the European Pharmaceutical Marketing Research Association (http://www.ephmra.org/).

All GlobalData databases are continuously updated and revised.

5.1.1 Coverage

The objective of updating GlobalData’s coverage is to ensure that it represents the most up-to-date vision of the industry possible.

Changes to the industry taxonomy are built on the basis of extensive research of company, association and competitor sources.

Company coverage is based on three key factors: revenue; product and media attention; and innovation and market potential.

The estimated revenue of all major companies, both private and public, are gathered and used to prioritize coverage.

GlobalData aims to cover all major news events and deals in the medical devices industry, updated on a daily basis. The coverage is further streamlined and strengthened with additional input from GlobalData’s expert panel.

5.1.2 Secondary Research

The research process begins with extensive secondary research using internal and external sources to gather all relevant data and information pertaining to a particular market model for a particular country. The secondary research sources that are typically referred to include, but are not limited to:

- Company websites, annual reports, financial reports, broker reports, investor presentations and SEC filings
- Industry trade journals, scientific journals and other technical literature
- Association and healthcare organization websites
- PubMed, Medscape and other relevant services which compile extensive reviews of clinical literature
- Internal proprietary databases
- Relevant patent and regulatory databases
- National government documents, statistical databases and market reports
- Procedure registries
- News articles, press releases and web-casts specific to the companies operating in the market
5.1.3 Primary Research

GlobalData conducts interviews with industry participants and commentators in order to validate its data and analysis. A typical research interview fulfills the following functions:

- Provides first-hand information on market size, market trends, growth trends, competitive landscape and future outlook
- Helps to validate and strengthen secondary research findings
- Further develops the analysis team’s expertise and market understanding

Primary research involves email correspondence, telephone interviews and face-to-face interviews for each market, category, segment and sub-segment across a range of geographies.

The participants who typically take part in such a process include, but are not limited to:

- Industry participants: CEOs, VPs, marketing/product managers, market intelligence managers and national sales managers
- Distributors, paramedics and representatives from hospital stores, laboratories and pharmacies
- Outside experts: investment bankers, valuation experts and research analysts that specialize in specific medical equipment markets
- Key opinion leaders: physicians and surgeons that specialize in the therapeutic areas in which the medical device is used

The market data was validated based on the inputs from 1,725 primary research participants. The primary research participants included stakeholders from demand side such as Nurses, Surgeons, Paramedics and Physicians as well as participants from the supply side such as the Marketing Managers, Sales Managers and Product Managers of companies manufacturing/marketing wound care products.
Table 17: Total Number of Primary Research Participants, Wound Care Management, by Country

<table>
<thead>
<tr>
<th>Country</th>
<th>Total Number of Primary Research Participants</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>172</td>
</tr>
<tr>
<td>Brazil</td>
<td>143</td>
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<tr>
<td>India</td>
<td>140</td>
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<tr>
<td>United Kingdom</td>
<td>128</td>
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<tr>
<td>Italy</td>
<td>120</td>
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<tr>
<td>Australia</td>
<td>118</td>
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<tr>
<td>Canada</td>
<td>114</td>
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<tr>
<td>Germany</td>
<td>111</td>
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<tr>
<td>France</td>
<td>111</td>
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<tr>
<td>Spain</td>
<td>108</td>
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<tr>
<td>Russia</td>
<td>101</td>
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<tr>
<td>Mexico</td>
<td>99</td>
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<tr>
<td>China</td>
<td>94</td>
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<tr>
<td>South Korea</td>
<td>90</td>
</tr>
<tr>
<td>Japan</td>
<td>76</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1,725</strong></td>
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</table>

Source: GlobalData

5.1.4 Market Modeling and Forecasting

GlobalData uses an epidemiology-based treatment flow model and capital equipment-based model to estimate and forecast market size.

*Epidemiology-Based Market Model and Forecasting*

The epidemiology-based forecasting model uses epidemiology data gathered from research publications and primary interviews with physicians to establish the target patient population and treatment flow pattern for individual diseases and therapies. The data covers prevalence, incidence, diseased population, diagnosed population, and treatment population.

- The market forecast begins with the general population, the size of which varies depending on the indication.
- Prevalence is the percentage of the total population that suffers from a particular disease or condition.
- Incidence is the number of new cases of a condition, symptom, death or injury that develop during a specific time period, such as one year.
- The diseased population is the population suffering from a particular disease or condition.
- The diagnosed population is the population that has been diagnosed with a particular disease or condition, expressed as a percentage of the prevalence population.
The treatment population is the percentage of the population that has been diagnosed with a particular disease or condition.

Device uptake is the percentage of the treatment population using a particular device, determined based on the primary responses and the information available in secondary sources.

The epidemiology-based forecasting model for a medical device is used to:

- Determine the patient segment using a particular device or procedure
- Determine the frequency of usage of a particular device depending on the patient type, which further helps to determine the absolute unit sales of a device in a year

The market for any medical device is directly proportional to the volume of units sold and the price per unit.

\[
\text{Market size} = \text{volumes of units sold} \times \text{ASP (Average Selling Price)}
\]

The volume of units sold is calculated from the number of patients using or that has been implanted with the device. Data on treatment rate, diagnosis and surgical treatment rate, if unavailable from research publications, is gathered from interviews with physicians and used to estimate the patient volume for the disease under consideration.

The ASP of a device is mostly gathered from primary and secondary sources. ASP is the price at which a device is available in a target country to an end-user. For capital equipment, the end-user is typically considered to be the healthcare setting. For implants and consumables purchased by patients, the end-user is the patient.

Factors such as company share, reimbursement, company type (local/domestic or multinational) are taken into consideration during ASP analysis, which uses the following sources:

- Company websites
- Annual reports/industry reports
- Press releases
**Epidemiology-Based Forecasting Model**

**Figure 14: GlobalData Epidemiology-Based Forecasting Model**

**Capital Equipment-Based Market Model and Forecasting**

The capital equipment-based forecasting model is based on the installed base, replacements and new sales of a specific type of capital equipment in healthcare facilities such as hospitals, clinics and diagnostic centers. The installed base is calculated from the average number of units per facility. Sales for a particular year are arrived at by calculating the number of replacement units and new units (additional and first-time purchases). Secondary sources and interviews with supply-side participants and key opinion leaders from healthcare facilities are used to arrive at installed base and unit sales for a particular year. The factors typically affecting the forecast growth rates are:

- Growth in the number of healthcare facilities
- Healthcare spending and government programs and initiatives
- Migration from low-end equipment to high-end equipment
- Growth in the diagnosed population and treatment population
5.1.5 Company Share Analysis

Company shares are calculated by analyzing a company's sales in a particular market. In the case of public companies, annual reports and regulatory filings, investor presentations, earnings call transcripts and broker reports are used to determine a company's revenue in a particular market and in a particular geography.

In the case of the private companies, company share data is gathered mostly from primary interviews and secondary sources. Company share analysis is based on primary interviews with:

- Supply side (manufacturers)
- Procurement side
- Distributors
- Hospital purchasing groups
- Demand side (surgeons/specialists)
The benefits of this approach are:

- High number of respondents to validate and from which to derive accurate company shares
- Broad view from the supply, demand, and procurement side
- Prevents biased opinions being reproduced
- Demand-side interviews with key opinion leaders help to understand their preferences for the devices of specific companies, strengthening company share estimates

**Primary Interviews by Participant Type**

![Pie chart showing the distribution of interviews by participant type]

The final company share data is based on input from the supply side, the procurement side and the demand side, as well as secondary sources. Please note that market share for companies that are included under the ‘Others’ category is not tracked on an individual basis.

**5.1.6 Distribution Share Analysis**

Distribution share information is gathered using a combination of secondary and primary research. It is supported by primary interviews because the availability of secondary data is limited in most cases.

**5.2 Expert Panel**

GlobalData uses a panel of experts to cross-verify its databases and forecasts.

GlobalData's expert panel comprises marketing managers, product specialists, international sales managers from medical device companies, academics from research universities, key opinion leaders from hospitals, consultants from venture capital funds and distributors/suppliers of medical equipment and supplies.

Historic data and forecasts are relayed to GlobalData's expert panel for feedback and adjusted accordingly.
5.3 **GlobalData Consulting**

We hope that the data and analysis in this brief will help you to make informed and imaginative business decisions. If you have further requirements, GlobalData’s consulting team may be able to help you. GlobalData offers tailor-made analytical and advisory services to drive your key strategic decisions.

5.5 **Disclaimer**

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