

Hernia Repair Material Market By Type (Synthetic Mesh, Biological Mesh) , By Indication (Incisional hernia, Umbilical hernia, Inguinal hernia, Others) By End user (Hospitals, Ambulatory surgical centers, Others) : Global Opportunity Analysis and Industry Forecast, 2024-2033

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Abstracts

The hernia repair material market was valued at \$4.6 billion in 2023, and is projected to reach \$6.5 billion by 2033, growing at a CAGR of 3.5% from 2024 to 2033.

Hernia repair material refers to the synthetic or biological substances used in surgical procedures to reinforce or replace weakened or damaged tissues in the abdominal wall or other affected areas. These materials are used to close the defect caused by a hernia, preventing the recurrence of tissue protrusion. The most common types of hernia repair materials include synthetic meshes made from polymers like polypropylene and absorbable biological grafts derived from animal or human tissues.

The growth of the global hernia repair material market is majorly driven by increase in cases of hernia, particularly due to aging population, obesity, and physical strain. A study published in 2020 by the World Journal of Surgery estimated that around 20 million hernia repair surgeries are performed annually worldwide, highlighting the substantial demand for effective surgical interventions and materials used in these procedures. In addition, rise in awareness of hernia conditions and the availability of effective treatments is leading to more early-stage diagnoses, increasing the number of hernia repair procedures. Moreover, expanding healthcare infrastructure and rising investment in healthcare systems, especially in emerging markets, are propelling the demand for advanced hernia repair materials. Furthermore, surge in aging population

significantly contributes toward the market growth. This is attributed to the fact that as the global population ages, the prevalence of hernias and the need for effective surgical interventions continue to grow, driving the demand for advanced repair materials. As per the World Health Organization, the number of people aged 60 years and older was 1 billion in 2019. This number is estimated to increase to 1.4 billion by 2030 and 2.1 billion by 2050. However, rise in cases of postoperative complications such as infections, chronic pain, and mesh rejection restrains the market growth. In addition, high cost associated with advanced repair materials such as biologic meshes hampers the market growth. On the contrary, innovations such as laparoscopic and robotic surgeries have boosted the adoption of advanced hernia repair materials, as these methods often require specialized products for precise, minimally invasive procedures. Moreover, ongoing developments in synthetic and biological mesh technologies, focusing on reducing complications such as infection and improving patient outcomes, are driving market growth. Such developments are expected to offer lucrative opportunities for the market growth during the forecast period.

The global hernia repair material market is segmented into type, indication, end user, and region. On the basis of type, the market is categorized into synthetic mesh and biological mesh. As per indication, the market is divided into incisional hernia, umbilical hernia, inguinal hernia, and others. On the basis of end user, the market is categorized into hospitals, ambulatory surgical centers, and others. Region wise, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

Key Findings

On the basis of type, the synthetic mesh materials segment dominated the hernia repair market in 2023.

As per indication, the inguinal hernias segment is likely to be lucrative by 2033.

By end user, the hospitals segment exhibited the highest growth in 2023.

By region, North America held the largest market share, in terms of revenue, in 2023, the global hernia repair material market revenue, and is likely to dominate the market during the forecast period.

Competition Analysis

Competitive analysis and profiles of the major players in the global hernia repair

material market include Allergan Plc., B. Braun Melsungen AG, Baxter International Inc., Becton, Dickinson and Company (C.R. Bard, Inc.), Cook Medical, Inc., Herniamesh S.r.l., Johnson & Johnson (Ethicon Inc.), Medtronic Plc, The Cooper Companies, Inc., and W. L. Gore & Associates, Inc. These major players have adopted various key development strategies such as business expansion, new product launches, and partnerships to sustain the intense competition and gain a strong foothold in the global market.

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Patient/epidemiology data at country, region, global level

Regulatory Guidelines

Additional company profiles with specific to client's interest

Additional country or region analysis- market size and forecast

Expanded list for Company Profiles

Historic market data

SWOT Analysis

Key Market Segments

By Type

Synthetic Mesh

Biological Mesh

By Indication

Incisional hernia

Umbilical hernia

Inguinal hernia

Others

By End User

Hospitals

Ambulatory surgical centers

Others

By Region

North America

U.S.

Canada

Mexico

Europe

France

Germany

Italy

Spain

UK

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Australia

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

Allergan Plc.

B. Braun Melsungen AG

Baxter International Inc.

Becton, Dickinson and Company (C.R. Bard, Inc.)

Cook Medical, Inc.

Herniamesh S.r.l.

Johnson & Johnson (Ethicon Inc.)

Medtronic Plc

The Cooper Companies, Inc.

W. L. Gore & Associates, Inc.

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