

Hernia Repair Devices Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product Type (Hernia Mesh, Hernia Fixation Devices), By Procedure Type (Open Surgery, Laparoscopic Surgery), By Surgery Type (Inguinal Hernia, Umbilical Hernia, Incisional Hernia, Femoral Hernia, others), by region, and Competition

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Abstracts

Global Hernia Repair Devices Market was valued at USD 5.85 billion in 2022 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 3.20% through 2028. Hernia repair devices are medical devices and surgical instruments used in the treatment of hernias. Hernias occur when an organ or tissue protrudes through a weak spot or tear in the surrounding muscle or connective tissue, often causing a visible bulge or lump under the skin. Hernia repair devices are employed to reinforce, and repair weakened tissue or to prevent the recurrence of a hernia. These devices play a critical role in hernia surgeries, helping to provide stability and support to the affected area. Hernia meshes are the most common type of hernia repair device. These are flat or three-dimensional structures made from biocompatible materials like synthetic polymers or biologic tissue. Hernia meshes are placed over the hernia defect or weak area, providing reinforcement and support. They help prevent the protrusion of tissue or organs through the weakened abdominal wall. Meshes can be permanent or absorbable, and they may come with special coatings to reduce the risk of adhesions. Fixation devices are used to secure hernia meshes in place. They include staples, tacks, sutures, or self-adhesive materials. Fixation devices ensure that the mesh remains in the correct position and does not migrate.

Ongoing innovation in the design and materials of hernia repair devices has led to safer

and more effective products. Advanced materials, coatings, and mesh designs have improved patient outcomes and reduced complications. Increased patient awareness and improved diagnostics have led to earlier detection and treatment of hernias, boosting the market for hernia repair devices. Patients and healthcare providers are increasingly focused on improving the quality of life after hernia repair. This has led to the adoption of devices that offer quicker recovery times and reduced post-operative pain. Favorable reimbursement policies and insurance coverage for hernia repair procedures encourage patients to seek treatment and help drive market growth.

Key Market Drivers

Technological Advancements

The development of biological mesh materials, often derived from human or animal tissues, has provided a natural scaffold for tissue regeneration and integration. These meshes reduce the risk of complications and infections, particularly in contaminated or infected surgical fields. Hernia mesh materials have evolved to be lightweight yet exceptionally strong. These materials provide robust support for weakened abdominal walls while reducing the risk of discomfort and complications. Absorbable hernia mesh materials are designed to be gradually absorbed by the body over time. This eliminates the need for long-term foreign materials and the potential complications associated with them. Some hernia mesh devices are coated with anti-adhesion materials to reduce the risk of post-operative adhesions, which can cause pain and complications. These coatings promote smoother healing.

Three-dimensional mesh designs aim to provide better conformity to the patient's anatomy. This improves tissue integration and reduces the risk of mesh migration and recurrence. Devices used to secure hernia meshes have become more precise and minimally invasive. They include tacks, sutures, and self-adhesive fixation methods, which reduce the risk of nerve damage and pain. The use of robotic-assisted surgery in hernia repair procedures allows for greater precision and dexterity. Surgeons can perform minimally invasive surgeries with enhanced vision and control. Laparoscopic hernia repair techniques, which involve small incisions and the use of a camera, have become more refined. Advanced instruments and improved visualization technology make these procedures safer and more effective.

Biodegradable implants can be used to reinforce tissue and support hernia repairs. Over time, these implants are absorbed by the body, reducing the risk of long-term

complications. Advanced imaging techniques and navigation systems help surgeons identify and locate hernias with precision. This technology ensures that repairs are performed in the correct location and that the mesh is appropriately placed. Tissue engineering approaches are being explored to create synthetic tissues for hernia repair. These biocompatible materials can integrate with the patient's own tissue, offering a natural repair solution. Some hernia repair devices are equipped with sensors and monitoring technology. These devices can transmit real-time data on the patient's condition, allowing for proactive post-operative care. This factor will help in the development of the Global Hernia Repair Devices Market.

Rising Awareness and Diagnosis

Increased awareness about the signs and symptoms of hernias, such as bulging, pain, or discomfort, encourages individuals to seek medical attention promptly. Early diagnosis allows for timely intervention and treatment, which often involves the use of hernia repair devices. Awareness campaigns and educational efforts help inform the public about the importance of recognizing and addressing hernias. Informed patients are more likely to consult healthcare professionals when they suspect a hernia, leading to earlier diagnosis and treatment. Awareness extends to healthcare providers as well. When physicians are well-informed about hernia diagnosis and the range of treatment options, they are better equipped to identify hernias during routine check-ups and recommend suitable treatments, including hernia repair devices.

Public awareness can also focus on preventive measures to reduce the risk of hernia development. Lifestyle changes and risk factor management may contribute to a reduction in hernia incidence. Early diagnosis and timely intervention can prevent hernia complications, such as incarceration or strangulation. By addressing hernias in their earlier stages, patients are less likely to require emergency surgical procedures, which can be more complex and costly. Patients who are aware of hernias and their treatment options may actively participate in the decision-making process. They can work with their healthcare providers to choose the most suitable treatment approach, which may include hernia repair devices.

As awareness grows, the demand for hernia repair devices also increases. Patients who are well-informed may express a preference for advanced and minimally invasive techniques, contributing to the market demand for these devices. The growing market for hernia repair devices and associated technologies is driven, in part, by the increasing number of hernia diagnoses and subsequent treatments. This, in turn, attracts more research and innovation in the field. Awareness efforts may be part of

broader healthcare initiatives aimed at addressing hernia prevalence and improving healthcare outcomes on a global scale. This factor will pace up the demand of the Global Hernia Repair Devices Market.

Growing Emphasis on Quality of Life

Hernia repair devices are often associated with minimally invasive surgical procedures, such as laparoscopic or robotic-assisted surgery. These techniques result in smaller incisions, reduced post-operative pain, shorter recovery times, and improved cosmetic outcomes. Patients experience less discomfort and can return to their daily activities more quickly, leading to a higher quality of life. Hernia repair devices and techniques that minimize tissue trauma contribute to reduced post-operative pain and discomfort. This is a key factor in improving a patient's overall quality of life after surgery. Devices and procedures that allow for faster recovery enable patients to resume their regular activities sooner. This is particularly important for individuals with active lifestyles and work commitments.

Advanced hernia repair devices, such as those using biocompatible materials and anti-adhesion coatings, have contributed to a lower risk of complications. Reducing the likelihood of post-operative complications improves patient well-being and quality of life. Hernias can limit a patient's mobility and physical activity. Successful hernia repair using modern devices can help restore full mobility, allowing patients to engage in activities they enjoy and maintain a better quality of life. The use of high-quality hernia repair devices, such as meshes with superior materials and designs, can significantly reduce the risk of hernia recurrence. Avoiding the need for additional surgeries and the associated recovery periods contributes to an improved quality of life. When patients are satisfied with the results of their hernia repair and the overall surgical experience, it positively impacts their quality of life. High patient satisfaction often leads to increased demand for the use of these devices in hernia repair procedures.

Successful hernia repair and the associated improvements in physical health can positively affect a patient's psychological well-being. Reduced pain and a sense of well-being contribute to an overall better quality of life. The healthcare industry's shift towards patient-centered care places a greater emphasis on patients' comfort, well-being, and quality of life throughout the treatment process. Patients are increasingly proactive in choosing treatment options that align with their lifestyle and values. Hernia repair devices that enable a higher quality of life are often preferred by informed patients. This factor will accelerate the demand of the Global Hernia Repair Devices Market.

Key Market Challenges

Competitive Landscape

The market is crowded with a multitude of manufacturers and products. This saturation can make it challenging for new entrants to gain a foothold and for existing players to differentiate their offerings. Intense competition often leads to price wars. Manufacturers may reduce prices to gain or maintain market share, potentially impacting profit margins and the ability to invest in research and development. The need to stay competitive drives continuous innovation. Manufacturers must invest in research and development to introduce new and improved hernia repair devices, which can be costly and resource intensive. Meeting regulatory requirements is a significant challenge in a competitive market. Ensuring that products comply with strict regulatory standards and obtaining approvals can be time-consuming and expensive. Larger companies may engage in mergers and acquisitions, consolidating their market share and increasing their competitive advantage. This can make it difficult for smaller players to compete. With a wide range of hernia repair devices available, differentiating one's products from competitors can be a challenge. Companies must focus on unique features, materials, and patient outcomes to stand out. Building and maintaining customer loyalty and trust is crucial. Any quality issues, product recalls, or adverse events can erode trust and have a long-lasting negative impact on a company's reputation and market position.

Complications and Recurrence

Complications related to hernia repair procedures, such as infection, mesh migration, adhesions, or chronic pain, can impact patient safety and well-being. Ensuring patient safety is a primary concern for healthcare providers and device manufacturers. Complications can lead to additional healthcare costs. Patients may require extended hospital stays, follow-up procedures, or treatments to address complications, which can strain healthcare budgets. Patients who experience complications following hernia repair may be dissatisfied with their treatment outcomes. This can have a negative impact on the reputation of healthcare providers and device manufacturers. Hernia recurrence is a common concern, particularly in certain types of hernias. Recurrence may require revision surgery, adding to the healthcare costs and potential discomfort for patients. Complications, such as chronic pain or reduced mobility, can adversely affect a patient's quality of life. These issues may deter some individuals from seeking hernia repair, leading to delays in treatment. Certain complications, such as infections or adhesions, can have long-term health implications for patients. Managing these

complications may require ongoing medical care. Reducing complications and recurrence requires surgical expertise. Surgeons must be well-trained and experienced in the latest techniques to minimize the risk of these issues.

Key Market Trends

Minimally Invasive Procedures

Minimally invasive procedures are associated with reduced post-operative pain, smaller incisions, and faster recovery times compared to traditional open surgery. Patients experience less discomfort and can return to their normal activities more quickly. Minimally invasive techniques often allow for shorter hospital stays, promoting cost-effectiveness and patient convenience. Smaller incisions result in less scarring and improved cosmetic outcomes, which can be appealing to patients. Minimally invasive procedures are often associated with a lower risk of complications such as infections and wound issues. Laparoscopic and robotic-assisted techniques provide surgeons with enhanced visualization and precision, contributing to improved outcomes. The shift toward patient-centric healthcare emphasizes patient comfort and quality of life. Minimally invasive procedures align with this focus on patient well-being. Shorter hospital stays, reduced post-operative care, and quicker recovery times can lead to cost savings in the healthcare system. Minimally invasive techniques are being used for a wider range of hernia types, including inguinal, ventral, and incisional hernias.

Segmental Insights

Product Type Insights

In 2022, the Global Hernia Repair Devices Market largest share was held by hernia mesh devices segment and is predicted to continue expanding over the coming years. Hernias, such as inguinal and ventral hernias, are common medical conditions. Hernia mesh devices are widely used to reinforce weakened abdominal or groin tissue, making them suitable for a broad range of hernia repairs. The high incidence of hernias contributes to the significant market share of this segment. Hernia mesh devices are effective in providing support and preventing hernia recurrence. They can be used in various types of hernia repairs, including inguinal, ventral, umbilical, and incisional hernias, among others. Their versatility and proven efficacy make them a popular choice among surgeons. Hernia mesh devices are commonly used in both open and minimally invasive hernia repair procedures. Minimally invasive techniques, such as laparoscopic surgery, have become increasingly popular, and these procedures often

involve the use of mesh devices. This trend has contributed to the growth of the hernia mesh devices segment. The use of hernia mesh devices has been associated with lower recurrence rates compared to non-mesh repairs. Surgeons and patients often prefer mesh-based techniques for the improved long-term outcomes they offer.

Procedure Type Insights

In 2022, the Global Hernia Repair Devices Market largest share was held by open procedures Segment and is predicted to continue expanding over the coming years. When the hernia is large, complex, or involves a substantial amount of tissue, open procedures may provide better access and visibility for the surgeon. In some emergency situations, where there is a risk of bowel obstruction or strangulation, open procedures may be necessary to promptly address the hernia. With the hernia contents reduced, the surgeon focuses on repairing the hernia defect or weakness in the abdominal wall. Various techniques can be employed, including primary tissue repair (suturing the muscle layers together), reinforcement with sutures, or the use of synthetic or biologic mesh to provide additional support and prevent hernia recurrence.

Surgery Type Insights

In 2022, the Global Hernia Repair Devices Market largest share was held by inguinal hernia segment in the forecast period and is predicted to continue expanding over the coming years. Inguinal hernias are the most common type of hernias, accounting for a significant portion of all hernia cases worldwide. They occur when soft tissue, typically part of the intestine, protrudes through a weak spot or tear in the lower abdominal wall. This high incidence of inguinal hernias naturally drives the demand for hernia repair devices. Inguinal hernias can often be repaired using minimally invasive techniques, such as laparoscopic or robotic-assisted surgery. These procedures typically require hernia repair devices like mesh implants or plugs, contributing to the prominence of the inguinal hernia segment in the market. The development of innovative hernia repair devices, such as specialized mesh materials and fixation systems, has improved the outcomes of inguinal hernia repair procedures. These advancements have driven the use of hernia repair devices in this segment. Patients often prefer minimally invasive procedures for inguinal hernia repair due to the shorter recovery times and reduced post-operative pain. This preference leads to a higher demand for hernia repair devices in this segment. Inguinal hernias are more common in older individuals, and the global population is aging. This demographic trend increases the number of patients seeking treatment for inguinal hernias, further boosting the market for hernia repair devices in this segment.

Regional Insights

The North America region dominates the Global Hernia Repair Devices Market in 2022. North America, particularly the United States, has a relatively high incidence of hernias. Factors such as an aging population, lifestyle choices, and genetics contribute to the prevalence of hernias, which drives the demand for hernia repair devices. North America boasts well-developed healthcare infrastructure, including hospitals, clinics, and surgical centers. These facilities are equipped to perform hernia repair procedures using advanced devices and techniques. The region has been at the forefront of adopting minimally invasive surgical techniques, including laparoscopic and robotic-assisted procedures for hernia repair. These procedures are associated with quicker recovery times and less post-operative pain, making them increasingly popular among patients. North America is a hub for medical device innovation and technology development. This region is home to many prominent medical device companies that continuously invest in research and development to create advanced hernia repair devices.

Key Market Players

Medtronic Plc.

Ethicon Inc.

Beckton Dickinson & Co,

Atrium

W. L. Gore & Associates, Inc.

LifeCell International Pvt. Ltd.

B. Braun SE

Baxter International Inc.

Cook Medical Inc

Herniamesh S.r.l.

Report Scope:

In this report, the Global Hernia Repair Devices Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Hernia Repair Devices Market, By Product Type:

Hernia Mesh

Hernia Fixation Devices

Hernia Repair Devices Market, By Procedure Type:

Open Surgery

Laparoscopic Surgery

Hernia Repair Devices Market, By Surgery Type:

Inguinal Hernia

Umbilical Hernia

Incisional Hernia

Femoral Hernia

Others

Hernia Repair Devices Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Hernia Repair Devices Market.

Available Customizations:

Global Hernia Repair Devices Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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16.10.5. Recent Developments

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18. ABOUT US & DISCLAIMER

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