

India Lymphedema Treatment Market Forecast (2020-2030), and Country Share, Trend, and Growth Opportunity Analysis Coverage: Condition Type (Primary Lymphedema and Secondary Lymphedema), Treatment Type [Compression Devices and Bandaging, Drug Therapy, Physiological Procedure (Lymphovenous Anastomosis and Vascularized Lymph Node Transfer), Debulking Procedure, and Others], and End User (Hospitals, Clinics, Clinical Research Organizations, and Others))

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Abstracts

The India lymphedema treatment market size is projected to grow from US\$ 0.926 billion in 2022 to US\$ 1.511 billion by 2030; the market is estimated to record a CAGR of 12.29% during 2022–203.

Factors such as the prevalence of lymphatic filariasis, adverse effects of cancer treatment, and growing awareness of lymphedema are driving the market growth. However, the high cost of lymphedema treatment is hampering the market growth.

Use of Robotics for Lymphedema Treatment

The recent development of robotic-assisted microsurgery and super microsurgery has raised great expectations to support some of the most demanding microsurgical procedures applied in lymphatic reconstructive surgery to restore lymphatic vascular integrity and treat lymphedema. For instance, in March 2023, a 43-year-old woman in

Delhi was successfully treated for lymphedema using a supermicro surgery procedure at BLK-Max Super Speciality Hospital's Surgical Oncology Department. The patient had undergone breast conservation surgery with axillary lymph node dissection, followed by chemotherapy and radiation. The patient had a speedy recovery and could return to her daily work routine within four weeks of surgery with a full range of motion.

Recent preclinical and clinical studies of independent groups using different robotic systems demonstrate the feasibility of robotic technology to perform super microsurgical procedures successfully. The robotic assistance offers unparalleled precision, refining the surgical techniques and minimizing potential side effects, with clinical outcomes comparable to the traditional techniques. Robotic-assisted super microsurgery enables the performance of this delicate surgery beyond the physical capabilities of human hands, offering unprecedented dexterity, accuracy, and endurance. In addition, robotic systems will make access to the central part of the lymphatic system, e.g., the thoracic duct, more accessible.

The inclusion of artificial intelligence systems in robot-assisted systems promises to bring surgical techniques to a new level. The recording and analyzing of surgical movements used in intelligent robots will result in the development of cognitive skills and a process of "self-learning," thus leading to semi-automated surgical applications.

Therefore, the use of robotics in the treatment of lymphedema is likely to support the market growth in the future.

India Lymphedema Treatment Market: Segmental Overview

The "India Lymphedema Treatment Market" is segmented based on condition type, treatment type, and end user.

Based on the condition type, the global lymphedema treatment market is segmented into primary lymphedema and secondary lymphedema. The secondary lymphedema segment held the largest share of the market in 2022. The primary lymphedema segment is anticipated to register a higher CAGR during 2022–2030. Secondary lymphedema's significant share is usually attributed to cancer-related treatment, which is a prominent cause of secondary lymphedema.

Based on treatment type, the global lymphedema treatment market is segmented into compression devices and bandaging, drug therapy, physiological procedure, debulking procedure, and others. The physiological procedures segment is further segmented into

lymphovenous anastomosis (LVA) and vascularized lymph node transfer (VLNT). The debulking procedures segment is sub-segmented into liposuction, surgical debulking, and others. The compression devices and bandaging segment held the largest share of the market in 2022. The physiological procedure segment is expected to register the highest CAGR in the market during 2022–2030. This is mainly due to the appropriate treatment procedures performed on lymphedema patients through LVA and VLNT. These two procedures are appropriate treatment options for patients suffering from lymphedema.

Based on end user, the global lymphedema treatment market is segmented into hospitals, clinics, clinical research organizations (CROs), and others. The hospital segment held the largest share of the market in 2022 and the same is anticipated to register the highest CAGR in the market during 2022–2030 due to many lymphedema procedures being performed in the hospitals and the launch of innovative products by prominent players targeting hospitals for maximum utilization. In September 2020, Paul Hartmann partnered with Apollo Hospitals Group in India and West China Hospitals with a foremost focus on the surgery of wound care clinics and ambulances, medical training, and products and services. Such strategic steps allow companies to expand their product portfolio in developed markets. The hospital segment accounts for the maximum share of the overall lymphedema treatment market. This is mainly due to the growing adoption of minimally invasive surgeries in hospitals and the uptake of advanced imaging modalities for treating lymphedema. Additionally, surgeries are performed in hospitals for treating lymphedema. For example, at the University of Michigan, plastic surgeons and occupational therapists work together to determine the optimal treatment program for patients suffering from illness. For instance, the Penn Medicine report states that about 60% of the patients who underwent lymphedema treatment procedures in hospitals revealed clear improvement. Furthermore, favorable reimbursement policies supporting hospital lymphatic treatment support the overall market growth. For example, the growing awareness of lymphedema as an expensive preventable complication following oncology surgery eliminates the barriers between the medical coverage for therapeutic and prophylactic procedures among patients, hospitals, and the healthcare systems.

India Lymphedema Treatment Market: Country Overview

Radiation due to radiotherapy heightens the risk of lymphedema by directly injuring lymphatic vessels with subsequent reduction to the carrying capacity of the lymphatic vessels. As per an article published in the National Center for Biotechnology Information (NCBI), 'Cancer incidence estimates for 2022 and projection for 2025: Result from

National Cancer Registry Programme, India,' the number of cancer cases in India was estimated to be 1,461,427 in 2022. In India, 1 in 9 people is likely to develop cancer in their lifetime. Lung and breast were the leading cancer sites in males and females, respectively. As per Globocan 2020 report, breast cancer is the most common cancer in India. There were 178,361 (13.5%) cases of breast cancer in India in 2020. This is likely to demand radiotherapy in India. As per the same report, 72,510 (5.5%) new cases of lung cancer, 135,929 (10.3%) cases of lip and oral cavity cancer, 123,907 (9.4%) cases of cervix uteri cancer, 65,358 (4.9%) cases of colorectum cancer, and 748,348 (56.5%) cases of other cancers were reported in India. Therefore, the growing usage of radiotherapy to treat cancer and the high prevalence of cancer are driving the growth of the India lymphedema treatment market.

The prevalence of chronic diseases such as cardiovascular diseases (CVD) and stroke, rising geriatric population, lifestyle diseases, and the high prevalence rate of obesity in India are among the other factors driving the growth of the market. As per the World Heart Federation, CVDs account for 60% of total adult deaths in India. Addiction of smoking tobacco and increase in alcohol consumption are among the factors resulting in CVD-related risks in Indian adults (i.e., nearly 15% of the population). According to the Indian Stroke Association, 1.8 million people suffer from stroke in India annually. Also, awareness about stroke is less, and people living in rural areas are not aware of neurovascular diseases. Lymphedema can also be as a result of heart strain, and this occurs when the heart has to work harder to pump and circulate blood throughout the body, including the affected limb. Therefore, these factors are anticipated to spur the India lymphedema treatment market in this region.

Contents

1. INTRODUCTION

- 1.1 The Insight Partners Research Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights

3. RESEARCH METHODOLOGY

- 3.1 Coverage
- 3.2 Secondary Research
- 3.3 Primary Research

4. INDIA LYMPHEDEMA TREATMENT MARKET LANDSCAPE

- 4.1 Overview
- 4.2 PEST Analysis
 - 4.2.1 India PEST Analysis
 - 4.2.2 Lymphedema Treatment Algorithm
- 4.3 Post Cancer Surgery Lymphedema: Diagnosis and Treatment
 - 4.3.1 Post Cancer Surgery Lymphedema: Diagnosis and Treatment
 - 4.3.1.1 Overview
 - 4.3.1.2 Diagnosis
 - 4.3.1.3 Treatment for Lymphedema
- 4.4 Phlebology Etiology
 - 4.4.1 Treatment Procedures
 - 4.4.1.1 Lifestyle Changes (Weight Loss and Reducing Obesity)
 - 4.4.1.2 Rehabilitation Exercise and Lymphatic Drainage Massage
 - 4.4.1.3 Compression Therapy and Garments
 - 4.4.1.4 Prescribed Drug Therapy
- 4.5 Lymphedema Etiology
 - 4.5.1 Treatment Procedure
 - 4.5.1.1 Lifestyle Changes (Weight loss and reducing obesity)
 - 4.5.1.2 Rehabilitation Exercise and Lymphatic Drainage Massage
 - 4.5.2 Competitive Landscape

5. INDIA LYMPHEDEMA TREATMENT MARKET - KEY INDUSTRY DYNAMICS

5.1 Market Drivers

5.1.1 Rising Incidence of Lymphedema Cases

5.1.2 Growing Awareness of Lymphedema

5.2 Market Restraints

5.2.1 High Cost of Lymphedema Treatment

5.3 Market Opportunities

5.3.1 Rising Product Launches

5.4 Future Trends

5.4.1 Use of Robotics for Lymphedema Treatment

5.5 Impact Analysis

6. INDIA LYMPHEDEMA TREATMENT MARKET - REVENUE AND FORECAST TO 2030

6.1 India Lymphedema Treatment Market Revenue (US\$ Mn), 2022 – 2030

6.1.1 India: India Lymphedema Treatment Market, by Condition Type, 2020–2030 (US\$ Million)

6.1.2 India: India Lymphedema Treatment Market, by Treatment Type, 2020–2030 (US\$ Million)

6.1.3 India: India Lymphedema Treatment Market, by Physiological Procedures, 2020–2030 (US\$ Million)

6.1.4 India: India Lymphedema Treatment Market, by End User, 2020–2030 (US\$ Million)

7. INDIA LYMPHEDEMA TREATMENT MARKET – REVENUE AND FORECAST TO 2030 – BY CONDITION TYPE

7.1 Overview

7.2 India Lymphedema Treatment Market Revenue Share, by Condition Type 2022 & 2030 (%)

7.3 Primary Lymphedema

7.3.1 Overview

7.3.2 Primary Lymphedema: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

7.4 Secondary Lymphedema

7.4.1 Overview

7.4.2 Secondary Lymphedema: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

8. INDIA LYMPHEDEMA TREATMENT MARKET – REVENUE AND FORECAST TO 2030 – BY TREATMENT TYPE

8.1 Overview

8.2 India Lymphedema Treatment Market Revenue Share, by Treatment Type 2022 & 2030 (%)

8.3 Physiological Procedures

8.3.1 Overview

8.3.2 Physiological Procedures: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

8.3.2.1 Vascularised Lymph Node Transfer (VLNT)

8.3.2.1.1 Overview

8.3.2.1.2 Vascularised Lymph Node Transfer (VLNT): India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

8.3.2.2 Lymphovenous Anastomosis (LVA)

8.3.2.2.1 Overview

8.3.2.2.2 Lymphovenous Anastomosis (LVA): India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

8.4 Compression Devices and Bandaging

8.4.1 Overview

8.4.2 Compression Devices and Bandaging: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

8.5 Debulking Procedures

8.5.1 Overview

8.5.2 Debulking Procedures: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

8.6 Drug Therapy

8.6.1 Overview

8.6.2 Drug Therapy: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

8.7 Others

8.7.1 Overview

8.7.2 Others: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

9. INDIA LYMPHEDEMA TREATMENT MARKET – REVENUE AND FORECAST TO

2030 – BY END USER

9.1 Overview

9.2 India Lymphedema Treatment Market Revenue Share, by End User 2022 & 2030 (%)

9.3 Hospitals

9.3.1 Overview

9.3.2 Hospitals: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

9.4 Clinics

9.4.1 Overview

9.4.2 Clinics: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

9.5 Clinical Research Organization (CRO's)

9.5.1 Overview

9.5.2 Clinical Research Organization (CRO's): India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

9.6 Others

9.6.1 Overview

9.6.2 Others: India Lymphedema Treatment Market – Revenue and Forecast to 2030 (US\$ Million)

10. COMPANY PROFILES

10.1 Essity AB

10.1.1 Key Facts

10.1.2 Business Description

10.1.3 Products and Services

10.1.4 Financial Overview

10.1.5 SWOT Analysis

10.1.6 Key Developments

10.2 Lympha Press USA Ltd

10.2.1 Key Facts

10.2.2 Business Description

10.2.3 Products and Services

10.2.4 Financial Overview

10.2.5 SWOT Analysis

10.2.6 Key Developments

10.3 AIROS Medical Inc

- 10.3.1 Key Facts
- 10.3.2 Business Description
- 10.3.3 Products and Services
- 10.3.4 Financial Overview
- 10.3.5 SWOT Analysis
- 10.3.6 Key Developments
- 10.4 3M Co
 - 10.4.1 Key Facts
 - 10.4.2 Business Description
 - 10.4.3 Products and Services
 - 10.4.4 Financial Overview
 - 10.4.5 SWOT Analysis
 - 10.4.6 Key Developments
- 10.5 Bio Compression Systems Inc
 - 10.5.1 Key Facts
 - 10.5.2 Business Description
 - 10.5.3 Products and Services
 - 10.5.4 Financial Overview
 - 10.5.5 SWOT Analysis
 - 10.5.6 Key Developments
- 10.6 Lohmann & Rauscher GmbH & Co KG
 - 10.6.1 Key Facts
 - 10.6.2 Business Description
 - 10.6.3 Products and Services
 - 10.6.4 Financial Overview
 - 10.6.5 SWOT Analysis
 - 10.6.6 Key Developments
- 10.7 Huntleigh Healthcare Ltd
 - 10.7.1 Key Facts
 - 10.7.2 Business Description
 - 10.7.3 Products and Services
 - 10.7.4 Financial Overview
 - 10.7.5 SWOT Analysis
 - 10.7.6 Key Developments
- 10.8 Dynamic Techno Medicals Pvt Ltd
 - 10.8.1 Key Facts
 - 10.8.2 Business Description
 - 10.8.3 Products and Services
 - 10.8.4 Financial Overview

- 10.8.5 SWOT Analysis
- 10.8.6 Key Developments
- 10.9 Medi GmbH & Co KG
 - 10.9.1 Key Facts
 - 10.9.2 Business Description
 - 10.9.3 Products and Services
 - 10.9.4 Financial Overview
 - 10.9.5 SWOT Analysis
 - 10.9.6 Key Developments
- 10.10 Datt Mediproducts Pvt Ltd
 - 10.10.1 Key Facts
 - 10.10.2 Business Description
 - 10.10.3 Products and Services
 - 10.10.4 Financial Overview
 - 10.10.5 SWOT Analysis
 - 10.10.6 Key Developments
- 10.11 Smith & Nephew Plc
 - 10.11.1 Key Facts
 - 10.11.2 Business Description
 - 10.11.3 Products and Services
 - 10.11.4 Financial Overview
 - 10.11.5 SWOT Analysis
 - 10.11.6 Key Developments
- 10.12 SIGVARIS Management AG
 - 10.12.1 Key Facts
 - 10.12.2 Business Description
 - 10.12.3 Products and Services
 - 10.12.4 Financial Overview
 - 10.12.5 SWOT Analysis
 - 10.12.6 Key Developments
- 10.13 Tactile Systems Technology Inc
 - 10.13.1 Key Facts
 - 10.13.2 Business Description
 - 10.13.3 Products and Services
 - 10.13.4 Financial Overview
 - 10.13.5 SWOT Analysis
 - 10.13.6 Key Developments

11. APPENDIX

11.1 About Us

11.2 Glossary of Terms

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Product name: India Lymphedema Treatment Market Forecast (2020-2030), and Country Share, Trend, and Growth Opportunity Analysis Coverage: Condition Type (Primary Lymphedema and Secondary Lymphedema), Treatment Type [Compression Devices and Bandaging, Drug Therapy, Physiological Procedure (Lymphovenous Anastomosis and Vascularized Lymph Node Transfer), Debulking Procedure, and Others], and End User (Hospitals, Clinics, Clinical Research Organizations, and Others))

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