

US Lymphedema Treatment Market Forecast to 2028 - COVID-19 Impact and Country Analysis By Condition Type (Primary Lymphedema and Secondary Lymphedema), Treatment Type (Laser Therapy, Compression Devices & Bandaging, Drug Therapy, Physiological Procedures, Debulking Procedures, and Others), and End User (Hospitals, Clinics, Clinical Research Organization, and Others)

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Abstracts

The US lymphedema treatment market size is expected to grow from US\$ 5,185.98 million in 2022 to US\$ 8,320.07 million by 2028; it is estimated to record a CAGR of 8.2% from 2023 to 2028.

The US lymphedema treatment market growth is attributed to the rising incidence of lymphedema cases and increasing healthcare services and lymphedema management programs. However, a lack of awareness and skilled professionals is hampering the growth of the market.

Lymphedema involve the accumulation of lymph fluid in fatty tissues just beneath the skin. The condition is caused due to impaired flow in the lymphatic system of a person and is observed either in the legs or arms or in both. It can also be affecting abdomen, neck, genitals, and face of a person, depending on the portion of the body which has undergone treatment. Primary lymphedema is generally present at birth, while secondary lymphedema is caused due to dysfunction or damage to the lymphatic system.

According to the American College of Cardiology Foundation report, the treatment of lymphedema is primarily driven by symptom management, volume reduction, and infection prevention. For example, the first line of treatment for lymphedema is conservative management. Complete decongestive therapy (CGT) has become the forefront of physiotherapeutic conservative management. Additionally, surgical treatment approaches provide good adherence to conservative management. Moreover, the new minimally invasive vascularized lymph node transfer for lymphedema has gained significant attention worldwide. For example, physicians at Mayo Clinic's campus in Phoenix/Scottsdale, Arizona, have developed a new outpatient surgical procedure for patients experiencing lymphedema refractory to traditional therapy. Benefits associated with lymph node transfer involve a significant reduction of pain and swelling in the lymphedemic anatomy. Also, the surgery allows patients to decrease their antibiotic use, adding quality-of-life benefits among the patient pool. Further, patients diagnosed with breast, skin penile, bladder, and gynecological cancers may undergo lymph nodes procedure.

Lymphedema is a chronic, incurable disease affecting a patient's physical and mental well-being. Term-based care proves to be a multidisciplinary approach for patient management. The term-based care team includes people from physical rehabilitation, vascular medicine, plastic surgery, radiology, oncology, infectious disease, and social work. The team can provide a thorough evaluation for assessing the etiology of limb swelling, optimizing conservative care, and offering surgical treatment for appropriate candidates.

MedStar Health report states that a patient's lymphedema treatment plans will depend on the cause and severity of the condition. Doctors may prescribe medication or refer to a physical or occupational therapist specializing in the management of lymphedema. Therapies include reducing swelling and controlling pain through exercises, special massage techniques, or mechanical pumping devices. If a patient's condition is severe, doctors may recommend more advanced treatments such as lymph node transfer and lymphovenous bypass.

The Mayo Foundation for Medical Education and Research report states that the utility of robotics for lymphatic surgery allows much greater flexibility and precision compared to previously used laparoscopy. Additionally, the use of robotics proves optimal for both surgeon and patient outcomes and will reveal positive results during the forecast period. For instance, patients who underwent single-robotic surgery for lymphedema in May 2020 have provided positive anecdotal feedback, including significant clinical improvement such as the ability to wear clothes with the surgeon's significant

accomplishments. Further, robots enabled with artificial intelligence (AI) are increasingly assisting in microsurgical procedures in lymphedema surgeries for reducing surgeon variations that could affect patient recovery. For example, for lymphedema surgery, in May 2020, an urogynecology surgeon performed a first-of-its-kind single-port robotic mental harvest by utilizing a free lymph node transfer, intended for minimally invasive surgical treatment of lymphedema. The main objective of this new surgical treatment method is to minimize donor site morbidity with debilitating lymphedema symptoms.

Treatment-Based Insights

Based on treatment, the US lymphedema treatment market is categorized into laser therapy, compression devices and bandaging, drug therapy, physiological procedures, debulking procedures, and others. The physiological procedures segment is further segmented into lymphovenous anastomosis (LVA) and vascularized lymph node transfer (VLNT). Similarly, the debulking procedures segment is subdivided into surgical debulking, liposuction, and others. The compression devices and bandaging segment held the largest share of the market in 2022. The physiological procedure segment is anticipated to register the highest CAGR during the forecast period mainly due to the treatment availability through LVA and VLNT performed on lymphedema patients. Two main physiologic interventions are currently incorporated to treat lymphedema. The primary intervention creates a shunt (a hole or a small passage to facilitate movement) between the congested lymphatic channels with the venous system close to the location of lymphatic obstruction. The other physiologic intervention incorporates vascularized soft tissue flaps that frequently include vascularized lymph nodes to the affected lymphatic extremity. Under this segment, the vascularized lymph node transfer (VLNT) procedure will grow at the highest CAGR% during the forecasted year. The Radiological Society of North America (RSNA) states that lymphedema treatment has traditionally been conservative and limited, but surgical and microsurgical procedures have risen tremendously today. For instance, VLNT is one of the most prominent and promising techniques for micro surgeries. VLNT involves the transfer of functional lymph nodes (LNs) from a healthy donor site to an area of the body with damaged or diseased lymphatic drainage.

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