Hernia Mesh Devices Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 110 pages | Mordor Intelligence

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Report description:

The hernia mesh devices market is expected to register a CAGR of 4.3% over the forecast period.

Due to the sudden implementation of stringent lockdowns throughout the world during the pandemic, COVID-19 had a substantial impact on the market's growth. Additionally, due to the primary focus on emergency COVID-19 treatments, there were fewer patient visits, and hernia surgeries were postponed, leading to complications in patients suffering from hernias. For instance, according to the article published by National Center for Biotechnology Information (NCBI) in September 2022, the onset of the pandemic resulted in a reduction in the number of elective hernia surgeries, mainly the incisional hernia surgery, with the first three months of lockdown having the most significant impact. However, due to the gradual lifting of COVID-19 restrictions after May 2020, there was a surge in the number of inguinal hernia surgeries. For instance, as per the study published by NCBI in May 2022, approximately 43.0% of the patients endured inguinal hernia repair surgeries, 6.6% experienced incarceration, and 15.2% had an emergency department encounter during the post-cancellation period. Thus, the COVID-19 outbreak affected the market's growth adversely in its preliminary phase; however, the market is expected to gain traction due to the significant increase in the number of hernia repair surgeries globally.

The high prevalence of hernia all over the world, the surging number of surgeries being performed for the treatment of hernias, and the employment of biomaterials in three-dimensional mesh development are among the major factors driving the growth of the market studied. For instance, according to the National Center for Health Statistics report 2022, more than five million people in the United States suffer from hernia every year. The major factors causing hernia are the high geriatric population, constipation, chronic cough due to smoking, and high premature birth rates. In addition, in recent years, there has been a surge in the number of surgeries performed to treat hernia. For instance, according to the article published in NCBI in August 2022, inguinal hernia is the most commonly occurring type of hernia and over 800,000 inguinal hernia surgeries are performed every

year in the United States. Such factors are likely to boost the adoption of hernia mesh devices, thereby contributing to the market studied's growth.

Moreover, in the recent few years, there has been a surge in the employment of different biodegradable polymers for the development of three-dimensional meshes for hernia treatment. For instance, as per the article published in NCBI in February 2022, numerous biodegradable polymers are used to create medical devices, including implants and three-dimensional meshes. The bioactive and biocompatible qualities of biodegradable polymers, when combined with next-generation technologies and cell-based therapies, can advance tissue regeneration and the healing of damaged or injured tissue. Therefore, the adoption of biomaterials for three-dimensional mesh development is expected to accelerate the hernia mesh devices market globally and to increase in the future, thereby driving the growth of the market studied over the forecast period.

Hernia Mesh Devices Market Trends

Biologic Mesh Segment is Expected to Witness Significant Growth Over the Forecast Period

Biologic mesh is mainly developed from the porcine or human dermis. It offers several advantages over synthetic ones, including its high ability to be used in a contaminated area without the fear of infection. For instance, as per the article published in the American Society of Plastic Surgeons Wolters Kluwer Health, Inc. in February 2022, the synthetic meshes used for ventral hernia repair treatment led to several infections at the surgical site, fistula formation, abdominal stiffness, and adhesion. In order to address these issues, biological meshes were developed. More recently, they have been strongly recommended for use when infection risk is elevated, and contamination levels are high. Thus, due to the several benefits associated with the aid of biological meshes over synthetic ones, the segment is expected to register high growth during the forecast period.

Additionally, the recurrence rate of hernia is significantly less with the use of reinforced biologic ovine rumen (RBOR) mesh compared to the other types, leading to its high adoption while performing hernia surgeries. For instance, as per the study published in NCBI in February 2022, the risk of complications and hernia recurrence was higher in patients receiving cross-linked porcine acellular dermal matrices (C-PADM) mesh, i.e., 52.9%, in comparison to the ones receiving reinforced biologic ovine rumen (RBOR), i.e., only 16.7%. Thus, the adoption of RBOR for hernia treatment is augmenting the segment growth.

North America is Expected to Dominate the Hernia Mesh Devices Market

North America is expected to dominate the market owing to factors such as the high prevalence of hernias, the high number of hernia repair surgeries being performed in the region, and the adoption of machine learning models in the United States for the prediction of adverse events. As per the American College of Surgeons (ACS) in April 2022, in the United States, there are four million abdominal procedures performed annually, some of which may require hernia repair. Thus, the high number of hernia repair surgeries being performed in the region is expected to drive regional growth during the forecast period.

In addition, the adoption of ML models for the prediction of hernia recurrence in the United States is also burgeoning the regional market growth. For instance, in April 2022, the University of Texas MD Anderson Cancer Center announced the launch of an ML model, which can easily predict hernia recurrence and other complications post-surgery. In the patients who had been through ventral hernia surgery, the ML model showed the following accuracy rates: 85% for forecasting hernia recurrence, 72% for forecasting surgical site occurrence, and 84% for forecasting 30-day hospital readmission. Thus, the surgical number of hernia incidence and adoption of advanced models is expected to drive the demand for hernia mesh devices market in the region.

Therefore, owing to the aforesaid factors the growth of the studied market is anticipated in the North America Region.

Hernia Mesh Devices Market Competitor Analysis

The hernia mesh devices market is fragmented due to the presence of several companies operating globally and regionally. The competitive landscape includes an analysis of a few international as well as local companies which hold the market shares and are well known, including Medtronic Plc, Ethicon Inc., B. Braun SE, Becton, Dickinson and Co., W. L. Gore & Associates, Inc., AbbVie Inc., Getinge AB., Cook Medical, Integra LifeSciences, Dipromed SRL, among others.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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