

Europe Vascular Graft Market By Indication (EVAR, Abdominal Aneurysm Repair, Thoracic Aneurysm, Peripheral Vascular Repair), By Raw Material (Polyester, ePTFE, Polyurethane, Polyamide, Biosynthetic), By End User Industry (Hospital, Ambulatory Surgery Center), By Country, Competition, Forecast & Opportunities, 2018-2018F

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Report description:

Europe Vascular Graft Market has valued at USD 715.48 Million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 6.22% through 2028. Vascular grafts, also known as blood vessel grafts, are crucial medical devices used in vascular bypass procedures. These procedures involve redirecting the flow of blood from one part of the body to another by reconnecting the blood vessels. Vascular grafts are manufactured using a variety of materials, including polyurethane (PU), biosynthetic, polyester, and polytetrafluoroethylene (PTFE).

One of the primary purposes of vascular grafts is to replace injured or damaged veins, arteries, blood vessels, and valves during organ transplantation or hemodialysis, a process used to filter waste and excess fluid from the blood in individuals with kidney failure. Additionally, they are employed in cases of vascular occlusion, aneurysms, and coronary artery diseases. By providing structural support and promoting the healing process, vascular grafts help reduce blood leakage and facilitate the invasion of healthy cells from the adventitia without negatively affecting the endothelialization rate. Some common types of vascular grafts include hemodialysis access grafts, coronary artery grafts, endovascular stents, and peripheral vascular grafts. These specialized products cater to the unique needs of different medical procedures and conditions, ensuring optimal outcomes for patients.

Key Market Drivers

Increasing Prevalence of Cardiovascular Disorders

The increasing prevalence of cardiovascular disorders in Europe is undeniably bolstering the demand for vascular grafts, positioning these medical devices at the forefront of modern healthcare. Cardiovascular diseases, including coronary artery disease, peripheral arterial disease, and aortic aneurysms, have become a growing health concern across the continent, primarily due to factors like an aging population, sedentary lifestyles, and dietary habits. Consequently, the demand for effective treatment

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options, such as vascular grafts, has soared.

Vascular grafts play a pivotal role in addressing the intricate challenges posed by cardiovascular disorders. They provide crucial solutions for patients with arterial blockages, damaged blood vessels, or those requiring bypass surgery. As the prevalence of these conditions rises, so does the necessity for vascular grafts, which can restore proper blood flow, prevent complications like limb amputations, and ultimately save lives.

Moreover, advancements in medical technology and surgical techniques have made vascular graft procedures safer and more accessible, encouraging their widespread adoption. Minimally invasive approaches and the development of endovascular grafts have reduced the morbidity associated with traditional open surgeries, making graft placement a viable option for a broader spectrum of patients, including those who are elderly or have comorbidities. The increasing prevalence of cardiovascular disorders in Europe is driving up the demand for vascular grafts, as these devices represent a crucial lifeline for individuals suffering from these conditions. The ongoing commitment to research and innovation in the field of vascular surgery is likely to further amplify the role of vascular grafts in addressing the continent's cardiovascular health challenges.

Technological Advancements in the Scaffold Material and Design of Vascular Grafts

Technological advancements in scaffold materials and the design of vascular grafts have catalyzed a significant surge in demand for these life-saving medical devices in Europe. Vascular grafts are essential in treating a wide array of cardiovascular conditions, including arterial blockages, aneurysms, and vascular trauma, and their evolution is transforming the landscape of vascular surgery. Traditional grafts were often prone to complications like thrombosis or graft failure, but modern scaffold materials, such as biodegradable polymers and bioengineered tissues, offer improved performance and reduced risk of adverse events. These materials not only mimic the mechanical properties of natural blood vessels but also encourage tissue integration, minimizing the chances of graft rejection.

Furthermore, advancements in graft design have led to more tailored solutions for individual patients. Customizable grafts, created using cutting-edge 3D printing and computer-aided design technologies, allow surgeons to match the graft precisely to the patient's unique anatomical requirements. This personalization not only enhances the success rate of graft procedures but also reduces the likelihood of postoperative complications, making vascular grafts a more attractive option for both patients and healthcare providers.

In addition, these innovations have shortened recovery times, decreased hospital stays, and improved overall patient outcomes, making vascular grafts an increasingly favored treatment option in Europe's aging population. As the region continues to invest in research and development, coupled with a growing awareness of these technological advancements, the demand for vascular grafts is expected to soar, ensuring that patients receive the best possible care for their cardiovascular conditions.

Rising Healthcare Expenditure

The escalating healthcare expenditure in Europe is undeniably contributing to the increasing demand for vascular grafts, highlighting the pivotal role these medical devices play in contemporary healthcare. As healthcare systems grapple with the financial burden of addressing a myriad of medical conditions, including cardiovascular disorders, the demand for effective treatments like vascular grafts is on the rise.

The growing healthcare expenditure is partly driven by the continent's aging population, as elderly individuals are more susceptible to cardiovascular diseases, often requiring complex interventions. Vascular grafts are integral in these scenarios, as they can provide critical solutions for patients with arterial blockages, aneurysms, or damaged blood vessels. The cost-effectiveness of vascular grafts in preventing costly long-term complications, such as limb amputations or extensive hospital stays, makes them an attractive option in the context of healthcare budget considerations.

Furthermore, ongoing advancements in medical technology have allowed for more precise and minimally invasive graft placement procedures, reducing both the overall cost of treatment and the financial burden on patients and healthcare systems. These developments make vascular grafts not only life-saving but also cost-effective solutions, aligning with the fiscal challenges faced by European healthcare systems.

Increasing Demand for The Technologically Advanced Products

The surging demand for technologically advanced vascular grafts in Europe is emblematic of the ever-evolving landscape of healthcare and the growing expectations for cutting-edge medical solutions. This trend is propelled by several key factors, primarily the European population's increasing awareness of advanced medical treatments and their rising expectations for

superior healthcare outcomes.

In an era characterized by rapid technological innovation, patients and healthcare providers alike are seeking state-of-the-art solutions for complex medical conditions, including cardiovascular disorders. Vascular grafts, equipped with the latest advancements in materials and design, align perfectly with this demand. Advanced materials like biodegradable polymers and bioengineered tissues not only enhance the biocompatibility and durability of grafts but also promote seamless integration with the patient's own vascular system, reducing the risk of complications.

Moreover, the introduction of cutting-edge technologies such as 3D printing and computer-aided design has enabled the customization of vascular grafts to match each patient's unique anatomical requirements. This level of personalization not only improves the chances of successful graft procedures but also fosters trust and confidence among patients, who increasingly seek tailored medical solutions. The pursuit of technologically advanced vascular grafts is not only driven by patients but also by healthcare providers who strive to offer the best available treatments. These grafts, with their enhanced performance and reduced risk profiles, lead to shorter recovery times, reduced hospital stays, and improved overall patient outcomes, thus further fueling their demand in the European healthcare landscape.

Key Market Challenges

Unfavorable Reimbursement Scenario

The demand for vascular grafts in Europe is facing a challenging landscape due to the unfavorable reimbursement scenario prevalent in many healthcare systems across the continent. This critical issue has a substantial impact on both patients and healthcare providers, ultimately leading to a decrease in the utilization of these vital medical devices.

In Europe, reimbursement policies and rates for medical procedures and devices are subject to stringent regulations and budget constraints within national healthcare systems. Vascular grafts, despite their proven effectiveness in treating cardiovascular conditions, often face limitations in terms of reimbursement, which can result in higher out-of-pocket costs for patients or financial constraints for hospitals and clinics. This unfavorable reimbursement scenario can deter both patients and healthcare providers from choosing vascular grafts as a treatment option, opting instead for alternative, less costly treatments.

Furthermore, the financial burden associated with unfavorable reimbursement can have a cascading effect on the healthcare industry. Hospitals and healthcare facilities may be reluctant to invest in the latest technological advancements or may prioritize cost-effective alternatives, potentially compromising the quality of care provided to patients with cardiovascular disorders.

High Risk Associated with Graft Failures

The demand for vascular grafts in Europe is experiencing a decline owing to the high risk associated with graft failures. Vascular grafts are essential medical devices used to treat various cardiovascular conditions; however, their effectiveness is often compromised by the inherent risks of graft failure, which have led to patient apprehension and healthcare provider reluctance. Graft failure due to thrombosis can necessitate repeat surgeries, extended hospital stays, and increased healthcare costs, causing both patients and providers to reconsider the use of vascular grafts.

Moreover, the long-term durability of vascular grafts remains a significant concern. Over time, grafts may degrade or become obstructed due to factors like material fatigue, inflammation, or infection. This uncertainty surrounding the longevity of grafts has led some patients and healthcare providers to seek alternative treatment options with a more predictable track record.

Additionally, graft-related infections pose a substantial risk, especially in cases where the graft must be removed to mitigate the infection. This scenario can result in life-threatening complications and further deter the use of vascular grafts.

To counteract these issues and boost the demand for vascular grafts, ongoing research and development efforts focus on enhancing graft materials, design, and monitoring techniques. The aim is to reduce the risks associated with graft failures and provide patients and healthcare providers with greater confidence in the long-term success of these vital medical devices. By addressing these challenges, the demand for vascular grafts in Europe may see a resurgence as they become safer and more reliable tools in the fight against cardiovascular diseases.

Key Market Trends

Technological Improvements

Technological improvements play a crucial role in shaping the vascular grafts market, with significant positive impacts anticipated during the forecast period. To meet the growing market demand, vendors are continuously innovating and introducing technologically advanced products. For instance, in 2017, Vascular Flow Technologies collaborated with Biovic, a Malaysian

biomedical business, to develop the groundbreaking Avatar Spiral Laminar Flow (SLF) vascular graft. This innovative graft design aims to optimize blood flow and enhance patient outcomes. Additionally, LeMaitre Vascular introduced the Omniflow II Biosynthetic Vascular graft for Peripheral Revascularization and AV Access. This graft is specifically engineered to provide superior strength and durability, effectively resisting the formation of aneurysms even years after implantation. These remarkable advancements across the product segment of vascular grafts are expected to further propel market growth, offering improved treatment options and better patient care.

Alarming Rise in End Stage Renal Disease Prevalence

The alarming rise in the prevalence of end-stage renal disease (ESRD) in Europe is undeniably increasing the demand for vascular grafts, highlighting their critical role in the management of this growing healthcare challenge. ESRD, often stemming from chronic kidney disease, necessitates renal replacement therapy, which includes hemodialysis, peritoneal dialysis, or kidney transplantation. Vascular grafts play a pivotal role in facilitating these treatments, and as the number of individuals requiring renal replacement therapy surges, so does the demand for reliable vascular access solutions. In response to this burgeoning healthcare challenge, research and development efforts are focused on improving graft materials, design, and implantation techniques to enhance their longevity and minimize complications. By addressing the specific needs of ESRD patients and the vascular challenges associated with renal replacement therapy, these innovations aim to meet the growing demand for vascular grafts in Europe and provide better outcomes and quality of life for those battling end-stage renal disease.

Segmental Insights

Raw Material Insights

Based on raw material, during the forecast period, the polyester grafts segment is expected to experience significant expansion. This growth can be attributed to recent advancements in polyester graft technology, which have facilitated its rapid adoption in various medical applications. For example, the combination of polyester grafts with collagen has been instrumental in the development of biosynthetic grafts, offering improved tensile strength and reducing the likelihood of graft rejection. These advancements in polyester graft technology are poised to drive the growth of the industry. Furthermore, the high demand for polyester grafts can be attributed to their associated advantages, such as longer lifespan and blood compatibility, which further contribute to the expansion of the segment. With these advancements and advantages, the polyester grafts segment is expected to witness a positive trajectory in the coming years.

End User Insights

Based on the end user, the hospitals segment emerged as the largest market share holder. With their ability to offer a wide array of treatments, ranging from cardiothoracic surgery to hemodialysis procedures, hospitals play a crucial role in providing care to patients with complex medical conditions. This comprehensive range of services is expected to drive the adoption rate of vascular graft products, further contributing to the growth of this segment in the future.

Moreover, the increasing number of admissions in hospital settings for various procedures will also contribute to the segment's growth over time. Additionally, the presence of new clinical trials being conducted in multi-specialty hospitals presents exciting opportunities for patients to explore and benefit from new experimental therapies. These trials not only expand the available treatment options but also pave the way for advancements in medical research and patient care. Overall, the hospitals segment is poised for continued growth and innovation, fueled by its diverse range of treatments, expanding patient base, and ongoing clinical trials conducted within multi-specialty healthcare settings.

Country Insights

The United Kingdom (UK) is projected to dominate the vascular graft market in Europe. One of the key drivers of this dominance is the growing geriatric population across the country. With more than 5.5 million people aged 65 and above estimated by the World Health Organization (WHO) to be living in the UK by 2020, the demand for vascular grafts is expected to increase significantly. Furthermore, the development of minimally invasive endovascular aneurysm repair techniques is anticipated to contribute to the surge in demand for procedures among elderly individuals. As a result, healthcare professionals are likely to opt for vascular graft products to meet the rising demand for such procedures. The increasing demand for vascular grafts in the UK is indicative of the importance of these medical devices in addressing the healthcare needs of the aging population. It highlights the crucial role that vascular grafts play in enabling healthcare professionals to provide effective treatment options for patients in need.

Key Market Players

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Getinge AB
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W.L. Gore and Associates, Inc.

Report Scope:

In this report, the Europe Vascular Graft Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□Europe Vascular Graft Market, By Indication:

- o□EVAR
- o□Abdominal Aneurysm Repair
- o□Thoracic Aneurysm
- o□Peripheral Vascular Repair

□□Europe Vascular Graft Market, By Raw Material:

- o□Polyester
- o□ePTFE
- o□Polyurethane
- o□Polyamide
- o□Biosynthetic

□□Europe Vascular Graft Market, By End User Industry:

- o□Hospital
- o□Ambulatory Surgery Center

□□Europe Vascular Graft Market, By Country:

- o□Germany
- o□France
- o□United Kingdom
- o□Italy
- o□Spain
- o□Russia
- o□Poland

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Europe Vascular Graft Market.

Available Customizations:

Europe Vascular Graft 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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