AORTIC STENT GRAFTS – CURRENT AND FUTURE PLAYERS
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2 Introduction

Aortic stent grafts are most commonly used to reinforce a weak spot in an artery, which is known as an aneurysm. The stent grafts are designed to seal tightly with the patient’s native artery above and below the aneurysm, and are used to treat abdominal aortic aneurysms (AAAs) as well as thoracic aortic aneurysms (TAAs). Aortic aneurysms, as opposed to aneurysms found elsewhere in the body, are potentially very serious, as a burst aorta results in massive internal bleeding that can be fatal unless treated rapidly by an experienced emergency medical team. Since their introduction in patients in 1991, aortic stent graft devices have gained wide acceptance and availability, with their adoption fueled in great part by advances in stent-graft design and by a variety of devices for various anatomic features. Over time, these devices have gained traction for use in patients with ruptured aneurysms because they are minimally invasive and have shorter recovery times.

Based on GlobalData’s key opinion leader (KOL) research, in the more mature Western markets, about 80% of surgical treatments for aneurysms are treated through endovascular therapy. This surgical rate is reduced further in the emerging nations, due to the high product cost. While endovascular therapy has its clear benefits, there are strong arguments still being made both clinically, and from a cost perspective, to continue doing open surgery. Overall, this minimally invasive endovascular technique saves hospitalization costs in the short run while it continues to bring in revenue for hospitals and practices, as several more of these cases can be scheduled in a day, with shorter surgical times.

This report focuses on the players in aortic stent graft implant market for abdominal and TAAs. The abdominal aortic market comprises about 80–90% of the market, with the niche market being the thoracic one. The thoracic aneurysm repair market is still a young market where there is a strong pipeline of products from both the large manufacturers and small emerging players. For most manufacturers, following the successful launch of an AAA product, the thoracic stent graft segment presents the opportunity with the most unmet needs for pursuit.

2.1 Catalyst

Increasing the applicability of aortic stent grafts to patients with difficult anatomic features will likewise require improvements as well as innovation in device design. Currently, the three most common anatomic reasons for exclusion from the endovascular repair of AAAs are inappropriate aortic (proximal) neck access, iliac artery aneurysms, and inadequate iliac access. Researchers
have noted that the next frontier for aortic stent grafts will be the continued adoption and development of endografts that are capable of treating various types of aortic aneurysms for a number of different patient anatomies. Further, in order to avoid follow-up on patients with implanted devices, future aortic stent graft products will have increased durability, refined designs to allow for treatment in the most difficult anatomies, and advanced abilities to treat aneurysms involving the renal and visceral segments of the aorta.

There are significant opportunities remaining for companies that can develop slimmer devices with reduced sheath diameter, improve the fixation of grafts, or add additional features including branches or fenestrated necks. Currently, some of the most frequently encountered barriers for aortic stent graft use consist of an inadequate or inappropriate proximal neck anatomy and an inadequate caliber of iliofemoral access vessels. As such, the ability of devices to accommodate patients with difficult necks or treacherous access vessels is important. That said, novel bifurcated endografts along with the development of widely available branched and fenestrated grafts are expected to address these barriers, thereby improving upon the already remarkable clinical success of this procedure.

2.2 Related Reports


2.3 Upcoming Related Reports

6.8 About MediPoint

MediPoint is the flagship product for GlobalData’s Medical team. Each MediPoint report is built from the ground up by our team of healthcare analysts in the US and UK. Each report includes input from experienced physicians and leading Key Opinion Leaders (KOLs). Running throughout each report in the series are, “What Do Physicians Think” quotes, which provide a unique insight into how healthcare professionals are reacting to events within the industry, and what their responses could mean for industry strategists.

6.9 About GlobalData

GlobalData is a leading global provider of business intelligence in the healthcare industry. GlobalData provides its clients with up-to-date information and analysis on the latest developments in drug research, disease analysis, and clinical research and development. Our integrated business intelligence solutions include a range of interactive online databases, analytical tools, reports, and forecasts. Our analysis is supported by a 24/7 client support and analyst team.

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