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Bone Grafts and Substitutes Market By Type (Allografts, Bone grafts substitutes, Cell based matrices) , By Application (Spinal fusion, Trauma, Joint reconstruction, Dental bone grafting, Craniomaxillofacial) By End user (Hospitals, Specialty clinics, Others) : Global Opportunity Analysis and Industry Forecast, 2024-2033

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Abstracts

The bone grafts and substitutes market was valued at $2.8 billion in 2023, and is projected t%li%reach $4.4 billion by 2033, growing at a CAGR of 4.4% from 2024 t%li%2033.

Bone grafts and substitutes are devices that are used t%li%replace missing or damaged bone in various medical procedures. They play a crucial role in orthopedics and spinal surgeries. The primary purpose of bone grafts and substitutes is t%li%support the body's natural healing process by providing a scaffold for new bone growth, enhancing the repair and regeneration of bone tissue. Thus, bone grafts and substitutes serve as vital tools in modern medicine, significantly improving patient outcomes in various surgical disciplines.

The growth of the global bone grafts and substitutes market is majorly driven by alarming increase in incidence of orthopedic conditions and rise in cases of fractures and sports injuries. A study published by Wolters Kluwer, a Dutch information services company, stated that approximately tw%li%million bone grafting procedures are performed worldwide per year. Among these, 500,000 bone graft are performed annually in the U.S. alone. Moreover, surge in geriatric population significantly contributes toward the market growth. Aged individuals are highly susceptible

t%li%bone-related disorders such as osteoporosis and arthritis. This is attributed t%li%the fact that minerals in bones of aged individuals start t%li%leech out, making them brittle, fragile, and easily breakable, thereby necessitating the need for bone harvesters. As per the World Health Organization, the number of people aged 60 years and older was 1 billion in 2019. This number is estimated t%li%increase t%li%1.4 billion by 2030 and 2.1 billion by 2050. Furthermore, shift in preference toward minimally invasive surgical techniques, which often involve bone grafts and substitutes, is notably contributing t%li%the market growth. In addition, increase in healthcare expenditure, especially in developing regions, is improving the access t%li%advanced orthopedic treatments, including bone grafting procedures, which acts as a significant driving force of the global market. However, high cost associated with bone grafting procedures and risk of immune rejection act as the key deterrent factors of the global market. On the contrary, innovations in graft materials and surgical techniques, such as the development of bioactive and synthetic bone grafts, have expanded the applications and improved the outcomes of bone grafting procedures, which are expected t%li%open new avenues for the growth of the market during the forecast period. For instance, bioactive materials, such as bioactive glass and ceramics, are gaining traction due t%li%their ability t%li%enhance bone regeneration. Moreover, in 2020, the U.S. Food and Drug Administration approved a novel synthetic bone graft substitute designed t%li%enhance bone healing in orthopedic and spinal surgeries, reflecting ongoing advancements and regulatory support in the market.

The global bone grafts and substitutes market analysis is segmented int%li%type, application, end user, and region. On the basis of type, the market is categorized int%li%allografts, bone grafts substitute, and cell-based matrices. Depending on application, it is divided int%li%spinal fusion, trauma, craniomaxillofacial surgery, joint reconstruction, and dental bone grafting. By end user, it is classified int%li%hospitals, specialty clinics, and others. Region wise, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

Key Findings

On the basis of type, the bone grafts substitute segment accounted for the largest share in 2023.

Depending on application, the spinal fusion segment occupied largest bone grafts and substitutes market size in 2023, and is expected t%li%remain dominant by 2033.

By end user, the hospitals segment was the major shareholder in 2023.

Region wise, North America garnered market share in 2023, and is anticipated t%li%continue this trend during the forecast period.

Competition Analysis

Competitive analysis and profiles of the major players in the global bone grafts and substitutes market include Arthrex, Inc, Johnson & Johnson, Medtronic plc, NuVasive, Inc., Stryker Corporation, Zimmer Biomet Holdings, Inc., Baxter International Inc., Xtant Medical Holdings, Inc., Integra LifeSciences, and Orthofix Holdings, Inc. These major players have adopted various key development strategies such as business expansion, new product launches, and partnerships t%li%sustain the intense competition and gain a strong foothold in the global market.

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Patient/epidemiology data at country, region, global level

Regulatory Guidelines

Additional company profiles with specific t%li%client's interest

Additional country or region analysis- market size and forecast

Expanded list for Company Profiles

Historic market data

SWOT Analysis

Key Market Segments

By Type

Allografts

Machined allografts

Demineralized bone matrix

Bone grafts substitutes

Bone morphogenic proteins (BMP)

Synthetic bone grafts

Cell based matrices

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By Application

Spinal fusion

Trauma

Joint reconstruction

Dental bone grafting

Craniomaxillofacial

By End User

Hospitals

Specialty clinics

Others

By Region

North America

U.S.

Canada

Mexico

Europe

France

Germany

Italy

Spain

UK

Rest of Europe

Asia-Pacific

China

Japan

India

South Korea

Australia

Rest of Asia-Pacific

LAMEA

Brazil

South Africa

Saudi Arabia

Rest of LAMEA

Key Market Players

Arthrex, Inc

Johnson & Johnson

Medtronic plc

NuVasive, Inc.

Stryker Corporation

Zimmer Biomet Holdings, Inc.

Baxter International Inc.

Xtant Medical Holdings, Inc.

Integra LifeSciences

Orthofix Holdings, Inc.

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