Shoulder Arthroplasty Market by Procedure (Partial Shoulder Arthroplasty, Total Shoulder Arthroplasty, and Revision Shoulder Arthroplasty), Device (Shoulder Arthroplasty Resurfacing Implants, Shoulder Arthroplasty Trauma Devices, and Shoulder Arthroplasty Platform Systems), Indication (Arthritis, Fracture/Dislocation, Rotator Cuff Tear Arthropathy, Hill Sachs Defect, and Other), and End User (Hospitals & Clinics, and Outpatient Surgical Centers) - Global Opportunity Analysis and Industry Forecast, 2017-2023

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Abstracts

Shoulder arthroplasty or shoulder replacement is a surgical procedure, which assists in the replacement of damaged ball and socket joint located in the shoulder. This is done using a prosthesis, usually consists of polythene and metal components. Shoulder arthroplasty has become a preferred modality of surgeons for the treatment of osteoarthritis, rheumatoid arthritis, and osteonecrosis, as these procedures have yielded significant and reproducible results. Large-scale adoption of total shoulder arthroplasty procedures for the treatment of people suffering from arthritis has highly contributed to the market growth.
Increase in prevalence of shoulder arthritis and rise in geriatric population worldwide drive the growth of the global shoulder arthroplasty market. In addition, rise in awareness towards shoulder arthroplasties and advancements in the surgical techniques supplement the market growth. However, increase in risk of postoperative complications, such as neurologic injury and hematoma, hampers the market growth.

Conversely, rise in investments by the key players to manufacture shoulder arthroplasty devices in the developing economies is expected to offer lucrative opportunities for the market growth. The global shoulder arthroplasty market was valued at $1,080 million in 2016, and is expected to reach $1,814 million by 2023, registering a CAGR of 7.6% from 2017 to 2023.

The shoulder arthroplasty market is segmented based on procedure, device, indication, end user, and region. On the basis of procedure, the market is divided into partial shoulder arthroplasty, total shoulder arthroplasty, and revision shoulder arthroplasty. By device, it is categorized into shoulder arthroplasty resurfacing implants, shoulder arthroplasty trauma devices, and shoulder arthroplasty platform systems. Depending on indication, it is classified into arthritis, fracture/dislocation, rotator cuff tear arthropathy, Hill Sachs defect, and other. As per end user, it is fragmented into hospitals & clinics and outpatient surgical centers. Regionally, the market is analyzed across North America, Europe, Asia-Pacific, and LAMEA.

The total shoulder arthroplasty (TSA) segment accounted for the highest share in the global shoulder arthroplasty market in 2016, and is anticipated to register a highest CAGR of 9.2% from 2017 to 2023. This is attributed to increase in adoption of total reverse shoulder arthroplasty.

In addition, shoulder arthroplasties are majorly performed in hospitals and clinics, and thus this segment generated the highest revenue. In the recent years, Asia-Pacific witnessed rapid growth in the shoulder arthroplasties market, owing to steady increase in the population suffering from various forms of arthritis. Moreover, increase in investments by the key players of Japan and India to develop shoulder arthroplasty devices is projected to offer lucrative opportunities for the expansion of the market.

KEY BENEFITS FOR STAKEHOLDERS

The study provides an in-depth analysis of the global shoulder arthroplasty market with the current trends and future estimations to elucidate the imminent investment pockets.

Comprehensive analysis of the factors that drive and restrict the market growth is provided.

Comprehensive quantitative analysis of the industry is provided from 2016 to 2023 to assist stakeholders to capitalize on the prevailing market opportunities.

Extensive analysis of the key segments of the industry helps to understand the trends in shoulder arthroplasty devices and procedures performed globally.

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Key players and their strategies are provided to understand the competitive outlook of the industry.

KEY MARKET SEGMENTS

By Procedure

Partial Shoulder Arthroplasty

Partial Resurfacing

Hemi Resurfacing

Partial-mid Head

Stemmed Hemi

Total Shoulder Arthroplasty

Total Resurfacing

Total-mid Head

Total Conventional

Total Reverse

Revision Shoulder Arthroplasty

By Device

Shoulder Arthroplasty Resurfacing Implants

Shoulder Arthroplasty Trauma Devices

Shoulder Arthroplasty Platform Systems

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By Indication

- Arthritis
  - Osteoarthritis
  - Rheumatoid Arthritis
  - Other Inflammatory Arthritis
- Fracture/Dislocation
- Rotator Cuff Tear Arthropathy
- Hill Sachs Defect
- Other

By End User

- Hospitals & Clinics
- Outpatient Surgical Centers

By Region

- North America
  - U.S.
  - Canada
  - Mexico
- Europe

- UK
- France
- Germany
- Italy
- Spain
- Rest of Europe

Asia-Pacific

- Japan
- China
- India
- Australia
- South Korea
- Rest of Asia-Pacific

LAMEA

- Brazil
- South Africa
- Turkey
- Saudi Arabia
- Rest of LAMEA

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KEY MARKET PLAYERS

- Wright Medical Group, Inc. /Tornier Inc.
- Integra LifeSciences Corporation
- Zimmer Biomet
- Johnson & Johnson (DePuy Synthes)
- Arthrex, Inc.
- Smith and Nephew Plc.
- Conmed Corporation
- DJO Global
- Evolutis
- Exactech, Inc.

The other players in the value chain include (profiles not included in the report)

- Implantcast GmbH
- Lima Corporate
- Medacta International
- Kinamed Incorporated
- Corin
- Imascap SAS
- Catalyst Orthoscience

Biotechni

Cayenne Medical

BioTek Instruments, Inc.

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