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The US Orthopedic Implants and Devices Market Outlook to 2018 – Driven by Rising Hip and Knee Replacement Surgeries

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Abstracts

The report titled ‘The US Orthopedic Implants and Devices Market Outlook to 2018 – Driven by Rising Hip and Knee Replacement Surgeries’ provides a comprehensive analysis of the various aspects such as market size, segmentation, trends and developments and future projections of the orthopedic devices as well as various orthopedic implants such as reconstructive joint replacement implants, spinal implants, trauma implants, Orthobiologics, bone cement and accessories, extremities and others as key segments of the market. The report also provides detailed explanation of market size, segmentation, market shares and company profiles of major players in major segments of hip and knee implants.

Around 28.6 million people in the US are estimated to sustain some kind of musculoskeletal injury annually according to the American Academy of Orthopedic Surgeons, which costs around USD 254.0 billion. As a result various orthopedic reconstruction and trauma device manufacturing companies have witnessed continued growth in revenues in recent years. One of the primary reasons for the rising incidence of various orthopedic diseases in the US is the growing population of people above 60 years of age. The individuals over the age of 60 years are the largest customers of reconstructive products such as hip, knee and spinal implants in the US. Moreover, younger individuals in their 40s and 50s are also undergoing orthopedic surgeries, thereby propelling the market for implants used in these surgeries. Orthopedic implants have been therefore one of the fastest growing segments in the medical device industry of the US in recent years. Orthopedic implants and devices market of the US forms a substantial part of the overall medical device industry of the country. It accounts for over ~% of the USD 125.0 billion medical device market of the US. However, the industry has already reached maturity stage as the supply of the orthopedic implants and

devices has exceeded the demand. Moreover, the market is highly concentrated, where only 5-6 leading manufacturing companies account for over 90% of the market.

The overall orthopedic products market in the US comprises of orthopedic equipments such as operating room equipment, arthroscopy devices and others; as well as orthopedic implants. Orthopedic implants are comprised of reconstructive, joint replacement implants, spinal implants, trauma implants, orthobiologics, hyaluronic acid and extremities and bone cement. Implants in the reconstructive joint replacement segment consist of hip implants, knee implants, spinal implants, shoulder implants and other related implants. The market is dominated by implants in terms of revenues, which accounted for around ~% of the overall orthopedic implants and devices market of the US in 2013. Orthopedic implant manufacturers in the US generated revenue of around USD ~ million in 2013, up from USD ~ million generated in 2008. Reconstructive joint replacement implants are the largest segment and represented around ~% of the revenues generated in the US orthopedic implants market in 2013. The high demand among the ageing Americans for large joint reconstruction procedures which include hip and knee replacement surgeries has resulted in a high share of reconstructive joint replacement implants over the years. Spinal implants were the second largest implant category which contributed around 27.2% to the orthopedic implants market of the US in 2013. Around 465,000 spinal surgeries were performed in the US in 2011 as per the American Academy of Orthopedic Surgeons (AAOS).

The reconstructive joint replacement implant market in the US can be segmented into knee, hip, shoulder and others on the basis of the use of implant and the site of the repair. Knee implants was the largest segment with a share of ~% in terms of revenue in 2013. Hip implants are the second largest segment which accounted for 35.9% of the US reconstructive joint replacement market in 2013. The segment generated revenues of USD ~ million and USD ~ million in 2008 and 2013 respectively. The growth in the hip implants segment has resulted from the rising number of primary and revision hip replacement procedures among the US population. The growing incidence of medical conditions such as osteoporosis, osteonecrosis, osteoarthritis and fractures are the primary factors responsible for surge in the hip replacement procedures. According to the American Association of Orthopedic Surgeons (AAOS) in the US alone around 10 million people have osteoporosis while 18 million more are at the risk of developing the disease. It is estimated that around ~ hip fractures occur every year in the country due to osteoporosis. Primary hip implants are the largest segment and accounted for around ~% of the total hip implant market in the US in terms of revenues in 2013. Hip implant manufacturers for this category generated USD ~ million of revenues in 2013. On the basis of the type of components, the hip implant market of the US can be segmented into stem, shell/liner, head and others. Stem is the largest segment with a share of around ~% in the overall hip implant market of the US in 2013. The two major segments of knee implants are primary knee replacement implants and revision knee replacement implants. The market has consistently been dominated by primary knee implants which accounted for around 95.0% and 93.0% of the total sales revenue from knee implants in the US in 2008 and 2013 respectively. On the basis of the types of components the knee implants can be categorized into Bicondylar femurs, tibia, tibial inserts, Patellas, unicondylar knees and others which include stems, wedges and hinged knees. Bicondylar femurs are the largest segment and accounted for around ~% of the knee implant market in terms of sales revenues in 2013. Around USD ~ million worth of Bicondylar femurs were sold in the US in 2013.

The hip implants market of the US is dominated by six leading players which account for over 90.0% of the market in terms of sales revenue. DePuy Synthes which is owned by Johnson & Johnson is the largest player with a market share of ~% in the domestic sales of hip implants by value in the US in 2013. Stryker is the second largest player which had a share of around ~% amounting to USD ~ million in 2013. Presently DePuy Synthes is the largest player and has a market share of around ~%. Zimmer is the second largest player at present and accounts for around ~% of the knee implant sales in US. It is estimated to have generated USD ~ million of revenue from knee implant sales in 2013. It is also estimated that around 67 million people or around 25% of the adult population will have physician diagnosed arthritis in the country by 2030. The overall orthopedic implants and devices market of the US is projected to surge to around USD ~ million in 2018 from USD ~ million in 2013 by expanding at a CAGR of ~% during the forecast period of 2013-2018.

KEY TOPICS COVERED IN THE REPORT

The market size of the US Orthopedic devices and implants market by value.

Market segmentation of the US Orthopedic devices and implants market by implants and devices.

Market segmentation of the US Orthopedic implants market by reconstructive joint replacement implants, spinal implants, trauma implants, orthobiologics, bone cement and accessories, extremity implants and others.

Market size and future projections of the reconstructive joint replacement

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implants, spinal implants, trauma implants, orthobiologics, bone cement and accessories, extremity implants and others.

Market segmentation of the reconstructive joint replacement implants by knee, hip, shoulder and other implants.

Market size and future projections of the US hip, knee, shoulder and other implants.

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