

Global Spine Biologics Market Size Study & Forecast, by Product (Spinal Allografts, Bone Graft Substitutes, Cell-base Matrix), By End-use (Hospitals, Ambulatory Surgical Centers), and Regional Analysis, 2023-2030

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Abstracts

Global Spine Biologics Market is valued at approximately USD 2.90 billion in 2022 and is anticipated to grow with a healthy growth rate of more than 5.08% over the forecast period 2023-2030. Spine biologics are biological materials used in treating spine-related conditions, promoting healing, tissue regeneration, or stabilization. They include bone grafts, bone morphogenetic proteins (BMPs), platelet-rich plasma (PRP), and mesenchymal stem cells (MSCs). These materials enhance healing, reduce complications, and improve outcomes in spinal surgeries by stimulating bone growth, tissue repair, and regeneration. Spine biologics play a crucial role in spine fusion surgery, addressing conditions like trauma, tumours, degenerative disc disease, and spinal cord injuries. The spinal biologics market growth is being driven by factors such as the increasing prevalence of spine disorders, subsequent increase in treatment rates, and the growing awareness regarding the benefits of biologics, including minimal postoperative time and faster recovery.

Along with this, spine biologics facilitate bone growth in various stages of spine fusion procedures, prompting their increased use with rising spinal fusion surgeries. The growing elderly population is a key driver for biologics demand, with spinal disorders like spinal stenosis prevalent among individuals over 50. Ageing induces structural spine changes, intensifying the risk of spinal impairments. The Journal of Spine Surgery (JSS) stated that Spinal deformities become more prevalent with age, affecting approximately 30% to 68% of the elderly population. Also, according to the Department of Economic and Social Affairs, in 2019, the world's population of people aged 65 and up totalled 703 million. Also, the number of elderly people is expected to increase to 1.5 billion by 2050.

In addition to age-related conditions, the prevalence of other spine disorders, such as scoliosis, kyphosis, and intervertebral disc degeneration, is also rising. Consequently, the increase in the risk of spinal deformities among older individuals is expected to stimulate the demand for spine biologics as spinal fusion surgeries increase globally. Thus, the increase in the geriatric population is propelling the growth of the Spine Biologics Market during the estimated period. Moreover, the increase in advancements in bone grafting procedures, as well as the rising inclination towards minimally invasive procedures present various lucrative opportunities over the forecast years. However, reimbursement issues, high bone graft costs, and ethical concerns are hampering the market growth throughout the forecast period of 2023-2030.

The key regions considered for the Global Spine Biologics Market study include Asia Pacific, North America, Europe, Latin America, and Middle East & Africa. North America dominated the market in 2022 owing to the rising inclination towards minimally invasive surgeries, and an increasing incidence of spine disorders such as disc-related issues, spinal stenosis, and spondylolisthesis. As per an article by the American Medical Association in May 2022, lumbar spinal stenosis is a prevalent issue, impacting approximately 11% of older adults in the U.S. Additionally, the presence of key industry players like Orthofix Holdings, Inc., Stryker, and NuVasive, Inc. throughout the U.S. is anticipated to bolster regional growth. Whereas Asia Pacific is expected to grow at the highest CAGR over the forecast years. The rise in the target patient population and growing awareness among patients and surgeons regarding the benefits of biologics are significantly propelling the market demand across the region. Also, the rise in the development of healthcare infrastructure, increasing healthcare spending, and a surge in the incidence of spine injuries are contributing to the region's market growth. Along with this, sedentary lifestyles and shifting behavioural patterns have led to an increased prevalence of obesity, further propelling market growth in the forecast period of 2023-2030.

Major market players included in this report are:

Stryker

NuVasive, Inc.

Orthofix

DePuy Synthes (Johnson & Johnson)

Exactech, Inc.

Zimmer Biomet

Arthrex, Inc.

Medtronic

Organogenesis Inc.

Kuros Biosciences.

Recent Developments in the Market:

In October 2023, Orthofix Medical Inc., a leading supplier of spine and orthopaedic solutions, unveiled the full commercial launch and 510k clearance of OsteoCove, an advanced bioactive synthetic graft designed for orthopaedic and spine procedures. OsteoCove is offered in strip and putty configurations to meet varied surgical needs.

In July 2023, Cerapedics Inc., a prominent bone graft provider, expanded its headquarters within the Denver metro area. This strategic expansion aims to bolster the company's diverse product portfolio, encompassing i-FACTOR bone grafts tailored for cervical spinal fusion procedures.

In April 2023, PUR Biologics, a subsidiary of HippoFi, Inc., launched PURcore, a bioactive moldable synthetic designed specifically for spinal surgeries.

Global Spine Biologics Market Report Scope:

Historical Data – 2020 - 2021

Base Year for Estimation – 2022

Forecast period - 2023-2030

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Segments Covered - Product, End-use, Region

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define the market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within countries involved in the study.

The report also caters to detailed information about the crucial aspects such as driving factors & challenges that will define the future growth of the market. Additionally, it also incorporates potential opportunities in micro markets for stakeholders to invest along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segment of the market are explained below:

By Product:

Spinal Allografts

Bone Graft Substitutes

Cell-base Matrix

By End-use:

Hospitals

Ambulatory Surgical Centers

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

Saudi Arabia

South Africa

Rest of Middle East & Africa

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