

# Bone Grafts and Substitutes - Market Insights, Competitive Landscape and Market Forecast–2026

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## Abstracts

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Bone Grafts and Substitutes Market By Source Type (Natural, Synthetic, And Others), By Product Type (Allografts [Demineralized Bone Matrix, Bone Morphogenetic Protein, And Cell-Based Matrices], Xenografts, And Others), By Application (Craniofacial, Dental, Joint Reconstruction, Spine, Others) End User (Hospitals, Specialty Clinics, And Others), By Geography is expected to grow at a steady CAGR (Forecast Period-2021-2026) owing to rising degenerative bone disorders and rising number of trauma cases.

Global Bone Grafts and Substitutes Market was valued at USD 3.02 billion in 2020, growing at a CAGR of 6.06% during the forecast period from 2021 to 2026 to reach USD 4.29 billion by 2026. The demand for Bone Grafts and Substitutes is primarily witnessing growth due to growing prevalence of degenerative bone disorders, rising number of trauma cases, increasing geriatric population, and the rising requirement for bone grafts and substitutes in dentistry.

### Bone Grafts and Substitutes Market Dynamics:

Bone grafts and substitutes market is on a rise due to a number of factors. One of the major factors driving the bone grafts and substitutes market is the rising geriatric population across the globe. Rising disposable incomes and increase focus on the improvement of healthcare facilities and access across the globe have been key factors in improving the quality of life and life expectancy in general. The elderly population is susceptible to numerous bone-related disorders and degenerative bone diseases. According to the data provided by the United Nations, in 2020, there were about 727

million people over the age of 65 years and above living across the globe. The number of the elderly population is further expected to double reaching over 1.5 billion over the period of three decades. The elderly population is susceptible to develop degenerative bone disorders more frequently than younger population.

As per the International Osteoporosis Foundation (2021), over 8.9 million fractures related to osteoporosis occur annually. It further stated that about one in five men and one in three women over the age of 50 are susceptible to suffer from a fracture due to weak bones. Osteoporosis is one of the common degenerative bone disease where the body starts to lose bone mass or makes too little bone.

As per NCBI article published in Journal of Orthopaedic Trauma titled “Hip Fracture Management-Global Approaches and Systems” by Miclau in 2020, hip fractures are one of the commonest geriatric injuries that result in adverse patient outcomes. As per the article, with the increasing aging population across the globe, it has been estimated that the overall global incidence of hip fractures is predicted to reach 4.5 million to 6.5 million by 2050. As hip and other bone fractures require surgical interventions in the correction of osseous defects, they are often accompanied with the application of bone grafts and substitutes.

Moreover, the rising number of trauma cases have also contributed in the rising demand for bone grafts and substitutes. As per the World Health Organization factsheet (2021) on road traffic injuries, road injuries are the leading cause of fatality in children and young adults in the age group 5-29 years. The same factsheet further stated that near about 20-50 million people suffer from non-fatal injuries in road accidents resulting in a disability as a result of their injury. Cranioplasty is one of the commonest procedures where, various bone substitutes such as demineralized bone matrix and hydroxyapatite are routinely used in cranioplasty procedures.

Furthermore, the rising demand for dental bone grafts and increasing number of spinal fusion procedures are also expected to drive the growth of the bone grafts and substitutes market.

However, the limitations of bone grafts and substitutes in the failing in the management of large bony defects, risk of infections associated with allografts, and limited osteoinductive and osteoconductive potential of synthetic bone grafts, are expected to limit the bone graft and substitutes market growth over the forecast period.

#### **Bone Grafts and Substitutes Market Segment Analysis:**

Bone Grafts and Substitutes Market By Source Type (Natural, Synthetic, and Others), Bone Grafts and Substitutes Market By Product Type (Allografts [Demineralized Bone Matrix Bone Morphogenetic Protein, and Cell-Based Matrices], Xenografts, and Others), Bone Grafts and Substitutes market by Application (Craniofacial, Dental, Joint Reconstruction, Spine, Others), Bone Grafts and Substitutes market by End User (Hospitals, Specialty Clinics, and Others), Bone Grafts and Substitutes market by Geography (North America, Europe, Asia-Pacific, and Rest of the World).

In by product type segment of the bone grafts and substitutes market, the allografts category segment is estimated to account for the largest market share during the forecast period. The allograft segment is further divided into the demineralized bone matrix, bone morphogenetic protein, and cell-based matrices. Adoption of allografts is increasing due to their properties such as immediate structural support and osteo-conductivity. These products also promote fast wound healing and reduce the surgery time. These are commonly used in spine, hip, and knee areas.

The advantages of allograft include the avoidance of donor-site morbidity, availability of numerous grafts, shorter operation time, and shorter rehabilitation time. They further offer several advantages such as improved safety profiles, availability in diverse sizes and shapes among other advantages, thereby resulting in their fastest growth in the forecast period.

North America is expected to dominate the overall Bone Grafts and Substitutes Market:

Among all the regions, North America is expected to account for the largest share in the bone grafts and substitutes market during the forecast period. This can be attributed to the growing prevalence of spine-related disorders, increasing geriatric population, couple with other supportive factors such as increasing orthopedic surgical procedures, new product launches, and increased focus on research and development predicted to be the major influencing factors in driving the overall growth of the bone graft and substitutes market over the forecast period.

As per the data provided by the National Spinal Cord Injury Statistical Center, United States in 2020, there are about 17,810 new cases of spinal cord injuries (SCIs) in the country. The factsheet indicated towards a higher prevalence in males with about 78% of males accounting for new SCI cases. One of the commonest ways to treat SCI is the surgery where in bone grafts and substitutes products are extensively used in spinal fusion procedures.

Furthermore, the study published in the Journal of Surgical Research titled “The National Burden of Orthopedic Injury: Cross-Sectional Estimates for Trauma System Planning and Optimization” by Jarman et al in 2020, analyzed the data from the Agency for Healthcare Research and Quality Healthcare Cost and Utilization Project for the estimation of incidence of orthopedic injury, polytrauma with orthopedic injury, and emergency operative orthopedic procedures performed for the management of traumatic injury. The study considered the study period for 2013-2014 and analyzed that a total of 7,214,915 patients were diagnosed with orthopedic injury in 2013-2014, resulting in 1,167,656 emergency orthopedic surgical procedures. Orthopedic surgical procedures are often supplemented with the use of bone grafts and substitutes which promote the bone healing process.

Furthermore, increasing focus on research and development activities is further expected to bolster the growth of the North American bone grafts and substitutes market. For instance, in February 2020, MTF Biologics received a USD 1.8 million grant in the nation via 2019 Extramural Research Grants Program. MTF Biologics is a global nonprofit organization, based in the United States that is involved in the development of various transplantation-associated products.

Owing to the abovementioned factors, the bone grafts and substitutes market is predicted to witness the highest growth in the North American region.

#### Bone Grafts and Substitutes Market Key Players:

Some of the key market players operating in the Bone Grafts and Substitutes market includes Zimmer Biomet, DePuy Synthes (Johnson & Johnson), Smith & Nephew, Stryker, Nuvasive Inc, Baxter, AlloSource, Orthofix Medical Inc., Musculoskeletal Transplant Foundation, Bioventus, Exactech Inc, B. Braun Melsungen AG, SeaSpine, Medtronic, Dentsply Sirona Inc. Institut Straumann AG, SOUTHERN IMPLANTS, MedBone Biomaterials, BioHorizons, NORAKER and others.

#### Recent Developmental Activities in Bone Grafts and Substitutes Market:

In May 2021, Prosidyan received the CE mark certifications for their fibergaft bone graft substitutes intended to be used in spinal fusion procedures.

In March 2020, BONESUPPORT AB received the breakthrough device status for their product “CERAMANT G” by the US Food and Drug Administration

which was followed by the submission of the DeNovo application in April 2020.

In January 2020, GreenBone Ortho received the CE mark certifications for their nature-inspired biomimetic GreenBone Bone Substitute. The product is derived from bamboo and can be shaped by surgeons to achieve the best fit in the treatment of the osseous defect.

### Key Takeaways from the Bone Grafts and Substitutes Market Report Study

? Market size analysis for current market size (2020), and market forecast for 5 years (2021-2026)

? The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the Bone Grafts and Substitutes market.

? Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

? Key companies dominating the Global Bone Grafts and Substitutes Market.

? Various opportunities available for the other competitor in the Bone Grafts and Substitutes Market space.

? What are the top performing segments in 2020? How these segments will perform in 2026.

? Which is the top-performing regions and countries in the current Global Bone Grafts and Substitutes market scenario?

? Which are the regions and countries where companies should have concentrated on opportunities for Global Bone Grafts and Substitutes market growth in the coming future?

Target Audience who can be benefited from this Bone Grafts and Substitutes Market Report Study

? Bone Grafts and Substitutes providers

- ? Research organizations and consulting companies
- ? Bone Grafts and Substitutes-related organization, association, forum, and other alliances
- ? Government and corporate offices
- ? Start-up companies, venture capitalists, and private equity firms
- ? Distributors and Traders dealing in Bone Grafts and Substitutes
- ? Various End-users who want to know more about the Bone Grafts and Substitutes Market and latest technological developments in the Bone Grafts and Substitutes market.

#### Frequently Asked Questions for Bone Grafts and Substitutes Market:

##### 1. What is a Bone Graft and Substitute?

? Bone grafts are implantable materials that are intended to promote bone healing, osseous reconstruction, and bone formation, due to their osteoinductive, osteoconductive, and osteogenic properties. Bone grafting is a surgical procedure for replacing a missing or defective bone with materials (bone graft) from a patient's body, cadavers, animals, or a different person. Bone grafts are also employed in filling bony voids in case of absence of bones as well as providing structural stability.

##### 2. What is the market for Global Bone Grafts and Substitutes?

? Global Bone Grafts and Substitutes Market was valued at USD 3.02 billion in 2020, growing at a CAGR of 6.06% during the forecast period from 2021 to 2026 to reach USD 4.29 billion by 2026.

##### 3. What are the drivers for Global Bone Grafts and Substitutes Market?

? The major drivers of the global bone grafts and substitutes market growth are the growth in the geriatric population, rising number of trauma cases, increasing prevalence of musculoskeletal disorders, growing prevalence of degenerative bone disorders, and the rising requirement for bone grafts and substitutes in the correction of bone defects.

#### 4. What are the key players operating in Global Bone Grafts and Substitutes Market?

? Some of the key market players operating in the Bone Grafts and Substitutes market includes Zimmer Biomet, DePuy Synthes (Johnson & Johnson), Smith & Nephew, Stryker, Nuvasive Inc, Baxter, AlloSource, Orthofix Medical Inc., Musculoskeletal Transplant Foundation, Bioventus, Exactech Inc, B. Braun Melsungen AG, SeaSpine, Medtronic, Dentsply Sirona Inc. Institut Straumann AG, SOUTHERN IMPLANTS, MedBone Biomaterials, BioHorizons, NORAKER and others.

#### 5. Which region has the highest share in Bone Grafts and Substitutes market?

? North America is expected to dominate the overall Bone Grafts and Substitutes market during the forecast period, 2021 to 2026. This can be attributed to the growing prevalence of spine-related disorders, increasing geriatric population, couple with other supportive factors such as increasing orthopedic surgical procedures, new product launches, and increased focus on research and development predicted to be the major influencing factors in driving the overall growth of the market over the forecast period.



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