

U.S. Market for Soft Tissue Reinforcement and Regeneration 2015

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Abstracts

The U.S. market for soft tissue reinforcement and regeneration includes medical graft devices that are designed to reinforce and regenerate soft tissues. Soft tissues are defined as aggregations of similarly specialized cells which collectively function to connect, support or surround other structures and organs of the body. These tissues include tendons, ligaments, fascia, skin, fibrous tissues, fat, synovial membranes, muscles, nerves and blood vessels. Collagen, the most abundant protein in mammals, is one of the characteristic elements inside the extracellular matrix of soft tissue and, as such, plays a critical role in soft tissue repair. Since soft tissue essentially makes up the majority of a person and there are countless medical conditions associated with soft tissue problems, a select group of large markets related to soft tissue repair will be covered in this report, including breast reconstruction, hernia repair, dural repair, vaginal slings, skin repair, sports medicine and tendon reinforcement, and dental soft tissue regeneration.

There are three primary classes of soft tissue repair devices; allografts, xenografts, and alloplasts.

The U.S. soft tissue reinforcement and regeneration market consists of specialized grafting devices utilized for the surgical treatment of a broad range of indications. While synthetic alloplast products have been traditionally used, newer biologic products have been gaining traction in this market. These new products offer superior regenerative results by expediting the healing process and reducing the likelihood of further post-operative complications.

Biologic products have a significantly higher cost, but in most cases, the added benefits they offer outweigh their premium prices. The increasing unit sales of these specialized

biologic products combined with their substantially higher ASP will fuel strong growth in the overall market.

The breast reconstruction market will more than double in value over the forecast period. Exceptionally strong double-digit growth will be driven by increases in unit sales volumes. The breast reconstruction market will more than double in value over the forecast period. Exceptionally strong double-digit growth will be driven by increases in unit sales volumes.

The incidence of breast cancer in younger women has been increasing in the United States; this population is more likely to opt for both mastectomy and breast reconstruction. The vast majority of breast reconstructions were tissue expander/implant-based (TEI) reconstructions. The remaining procedures were performed with autologous tissue, using techniques such as latissimus dorsi myocutaneous (LDM) flap, deep inferior epigastric perforators (DIEP) flap and transverse rectus abdominis myocutaneous (TRAM) flap.

In the last few decades, there has been an ongoing trend in the U.S. for women to undergo a prophylactic double mastectomy for preventative measures, even if breast cancer was only diagnosed in one breast. If the patient then decides to undergo breast reconstruction, both breasts must be completely rebuilt. This has caused the rate of bilateral reconstructions to skyrocket and has dramatically impacted the growth of the breast reconstruction market, as one product is usually used for each breast during a reconstructive procedure.

Highlights

Analyzes trends between biologic products (allografts and xenografts) and synthetic products

Covers a broad range of soft tissue related ailments and the graft products used to treat them

Descriptive and qualitative information for the market drivers and limiters for each chapter

Section on mergers and acquisitions for 2013 and 2014

Full competitive analysis of leading competitors

Discusses the rate of bilateral reconstructions, which is unique in the U.S. compared to other countries

Discusses differences in growth and price between allografts, xenografts, and alloplasts used for breast reconstructions

Added sub segments to alloplast segment which include a discussion of difference between growth and price between newer composite alloplasts and the traditional uncoated alloplasts

Discusses differences in growth and price between biologics and synthetics used for stress urinary incontinence

Recent changes in reimbursement have and will affect this market

Compares trends in products used for Achilles tendon reinforcement and rotator cuff reinforcement

Separated and removed barrier membrane products in order to focus solely on devices that facilitate soft tissue regeneration, resulting in dramatic changes in competitive landscape and amount of growth

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