

Orthopedic Implants Market Report by Product (Reconstructive Joint Replacements, Spinal Implants, Dental Implants, Trauma, Orthobiologics, and Others), Type (Knee, Hip, Wrist and Shoulder, Dental, Spine, Ankle, and Others), Biomaterial (Metallic Biomaterials, Ceramic Biomaterials, Polymers Biomaterials, and Others), End User (Hospitals, Orthopedic Clinic, Ambulatory Surgical Centers, and Others), and Region 2024-2032

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Abstracts

The global orthopedic implants market size reached US\$ 53.5 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 79.4 Billion by 2032, exhibiting a growth rate (CAGR) of 4.4% during 2024-2032. The increasing aging population, extensive advancements in orthopedic implant materials, designs, and surgical techniques, sedentary lifestyles and obesity, and increase in healthcare infrastructure and access to orthopedic care are some of the major factors propelling the market.

Orthopedic implants are specialized medical devices designed to address musculoskeletal conditions and injuries. These implants exhibit key characteristics such as biocompatibility, durability, and compatibility with the human body. They are typically constructed from materials like titanium, stainless steel, or medical-grade polymers, ensuring long-term stability within the body. Orthopedic implants feature a wide range of designs, including joint replacements like hip and knee prostheses, plates, screws, and rods for fracture fixation, and spinal implants for addressing spinal disorders. Their primary function is to restore mobility, relieve pain, and improve the overall quality of life for individuals suffering from orthopedic conditions, fractures, or degenerative joint

diseases.

The rising awareness of the medical benefits and technological advancements in orthopedic implant design and materials is propelling the orthopedic implants market growth. Similarly, the increasing demand for advanced healthcare solutions and the challenge of addressing orthopedic conditions are emphasizing the significance of orthopedic implants in medical procedures globally. Orthopedic implants play a pivotal role in restoring musculoskeletal function and alleviating pain, meeting the growing need for effective, biomechanically sound solutions. The expansion of distribution channels and efforts to standardize quality are further bolstering market growth. Additionally, factors such as the evolving understanding of orthopedic health, a preference for minimally invasive yet effective treatments, and a focus on sustainable, biocompatible materials are driving the orthopedic implant market's growth across diverse healthcare sectors worldwide.

Orthopedic Implants Market Trends/Drivers: Steadily Expanding Aging Population Base

The aging population is a primary driver of the orthopedic implants market. As the global demographic profile shifts towards an older population, there is an increased prevalence of musculoskeletal issues such as osteoarthritis and fractures. Elderly individuals often require orthopedic interventions to maintain their quality of life and mobility. Joint replacements, including hip and knee implants, are in high demand among this demographic. The continuous growth of the aging population, particularly in developed countries, ensures a sustained market for orthopedic implants. Manufacturers are investing in advanced implant technologies to cater to this expanding patient base, making it a key driver of market growth.

Technological Advancements and Innovations

Advancements in technology play a crucial role in propelling the orthopedic implants market. These innovations encompass materials, implant designs, and surgical techniques. Biocompatible materials like titanium and ceramics are increasingly used to develop implants that integrate seamlessly with the human body. Minimally invasive procedures, aided by cutting-edge imaging and navigation systems, reduce surgical trauma and recovery time. 3D printing has revolutionized implant manufacturing, enabling patient-specific implants for better outcomes. Moreover, the use of advanced materials like wear-resistant polyethylene extends the lifespan of joint replacements. Technological advancements not only improve implant performance but also enhance

patient satisfaction, making it a significant driver of market growth.

Increasing Incidences of Sports Injuries

The surge in sports and physical activity participation has led to a higher incidence of sports-related injuries. Orthopedic implants are frequently required to treat conditions like torn ligaments, fractures, and joint instability. Young athletes and fitness enthusiasts are increasingly seeking orthopedic solutions to return to their active lifestyles. This trend is not limited to professional athletes but extends to recreational sports and fitness enthusiasts. Consequently, the demand for orthopedic implants, such as anterior cruciate ligament (ACL) reconstruction devices and shoulder implants, is on the rise. As more people engage in sports and outdoor activities, the need for effective orthopedic interventions continues to grow, making sports-related injuries a significant driver of market expansion.

Orthopedic Implants Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global orthopedic implants market research report, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on product, type, biomaterial, and end user.

Breakup by Product:

Reconstructive Joint Replacements

- Knee Replacement Implants

- Hip Replacement Implants

- Extremities

- Spinal Implants

- Spinal Fusion Implants

- Vertebral Compression Fracture (VCF) Devices

- Motion Preservation Devices/Non-Fusion Devices

- Dental Implants

- Root Form Dental Implants

- Plate Form Dental Implants

- Trauma

- Orthobiologics

- Demineralized Bone Matrix (DBM)

- Allograft

- Bone Morphogenetic Protein (BMP)

Viscosupplementation Products

Synthetic Bone Substitutes

Others

Others

Reconstructive joint replacements represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the product. This includes reconstructive joint replacements (knee replacement implants, hip replacement implants, and extremities), spinal implants (spinal fusion implants, vertebral compression fracture (VCF) devices, and motion preservation devices/non-fusion devices), dental implants (root form and plate form dental implants), trauma, orthobiologics (demineralized bone matrix (DBM), allograft, bone morphogenetic protein (BMP), viscosupplementation products, synthetic bone substitutes, and others), and others. According to the report, reconstructive joint replacements represented the largest segment.

The orthopedic implants market for reconstructive joint replacements is segmented into distinct categories based on the type of joint involved, material used, and fixation technique. Primarily, the product types encompass hip replacements, knee replacements, shoulder replacements, and smaller joints like ankle, wrist, and elbow replacements. Among these, hip and knee replacements represent the most significant segments due to the high incidence of osteoarthritis and degenerative joint diseases in these areas. Material-wise, the market is segmented into metal alloys (such as stainless steel and cobalt-chromium), ceramics, and polymers. Each material offers unique benefits and potential drawbacks, and choices often depend on patient-specific needs and clinical circumstances. Regarding fixation techniques, the market can be broken down into cemented, cementless, and hybrid methods. Cemented replacements have been the traditional choice, providing immediate fixation.

Breakup by Type:

Knee

Hip

Wrist and Shoulder

Dental

Spine

Ankle

Others

Knee represents the largest market segment

The report has provided a detailed breakup and analysis of the market based on the type. This includes knee, hip, wrist and shoulder, dental, spine, ankle, and others. According to the report, knee represented the largest segment.

Knee implants represent a significant type segment within the global orthopedic implants market. Knee-related orthopedic issues, such as osteoarthritis, ligament injuries, and fractures, are widespread globally. As the aging population increases, the demand for knee implants is on the rise, making it a substantial segment in the orthopedic implants market. Moreover, knee implants, such as total knee replacements, have the potential to significantly improve the quality of life for patients suffering from debilitating knee conditions. They restore mobility, reduce pain, and enhance overall functionality. In addition to this, continuous innovations in knee implant materials, designs, and surgical techniques have led to improved implant longevity and patient outcomes. These advancements attract both patients and healthcare professionals, further driving market growth.

Breakup by Biomaterial:

Metallic Biomaterials

Stainless Steel

Titanium alloy

Cobalt alloy

Others

Ceramic Biomaterials

Polymers Biomaterials

Others

Metallic biomaterials represents the largest market segment?

The report has provided a detailed breakup and analysis of the market based on the biomaterial. This includes metallic biomaterials (stainless steel, titanium alloy, cobalt alloy, and others), ceramic biomaterials, polymers biomaterials, and others. According to the report, metallic biomaterials represented the largest segment.

The market for orthopedic implants utilizing metallic biomaterials is segmented based on several key variables, such as the type of joint being replaced, the specific metal

alloy used, and the intended clinical application. Metallic biomaterials are commonly employed in major joint replacements, such as hips, knees, and shoulders, given their strength and durability. Within this category, the market sees further division based on the type of metal alloy, including stainless steel, titanium alloys, and cobalt-chromium alloys. Stainless steel is often used for its affordability, but it's generally less resistant to wear compared to other materials. Titanium alloys are lauded for their biocompatibility and lower density, which makes them suitable for patients with metal sensitivities. Cobalt-chromium alloys are chosen for their wear resistance and mechanical strength. Furthermore, the market can also be segmented based on the fixation method: cemented, cementless, or hybrid fixation. Metallic biomaterials are versatile and can be employed in all these fixation techniques, each catering to specific clinical needs and patient demographics.

Breakup by End User:

Hospitals

Orthopedic Clinic

Ambulatory Surgical Centers

Others

The report has provided a detailed breakup and analysis of the market based on the end user. This includes hospitals, orthopedic clinic, ambulatory surgical centers, and others.

Hospitals indeed constitute a pivotal end user segment in the global orthopedic implants market. Hospitals serve as the primary institutions where orthopedic implant surgeries are performed. These institutions have the necessary infrastructure, specialized orthopedic surgeons, and support staff to conduct a wide range of orthopedic implant procedures. Moreover, hospitals are accessible to a broad spectrum of patients, including those with acute orthopedic injuries, chronic conditions, and elective procedures. This accessibility ensures a consistent flow of orthopedic implant surgeries. Hospitals are equipped to handle orthopedic emergencies, such as fractures and dislocations, which often require immediate surgical intervention. The availability of orthopedic implants in hospitals is crucial in these critical situations.

Orthopedic clinics are dedicated facilities focused exclusively on orthopedic care. They are staffed with specialized orthopedic surgeons and medical professionals who have in-depth expertise in treating musculoskeletal conditions. They are well-suited for outpatient procedures, including arthroscopic surgeries, minor joint injections, and other

minimally invasive interventions. These procedures often involve the use of orthopedic implants. These clinics are designed for efficiency, allowing for streamlined patient care. This is particularly beneficial for patients seeking prompt evaluation, diagnosis, and treatment of orthopedic issues. Patients can often secure appointments at orthopedic clinics more quickly than at hospitals, leading to faster access to orthopedic care and potential implant procedures.

Ambulatory surgical centers (ASCs) are designed for efficiency and convenience as they offer same-day surgical procedures, including many orthopedic implant surgeries, allowing patients to return home on the same day as their procedure. This reduces hospital stays and associated costs. Orthopedic implant procedures performed in ASCs are often more cost-effective than in hospitals. This can be appealing to patients and healthcare systems aiming to control healthcare expenses. ASCs are well-suited for minimally invasive orthopedic implant procedures, such as arthroscopy, which are increasingly popular due to their quicker recovery times and reduced post-operative pain.

Breakup by Region:?

North America

United States

Canada

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Latin America

Brazil
Mexico
Others
Middle East and Africa

North America exhibits a clear dominance, accounting for the largest orthopedic implants market share?

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Europe (Germany, France, the United Kingdom, Italy, Spain, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

In the North American market, orthopedic implants have seen consistent growth, particularly in sectors like healthcare facilities, specialized orthopedic clinics, and home care. Consumer awareness around joint health and elective surgeries is generally high in North America, making it a promising market for orthopedic products addressing conditions such as osteoarthritis, fractures, and degenerative disc diseases. Moreover, the presence of robust regulatory bodies like the FDA (Food and Drug Administration) adds credibility to approved devices, thereby potentially driving market demand. Companies operating in this region would benefit from aligning their marketing strategies with local healthcare trends, consumer preferences, and regulatory guidelines. With an aging population and increasing incidence of lifestyle-related orthopedic issues, there is a rising demand for innovative, safe, and efficient orthopedic solutions. Tailoring product offerings to meet these specific needs allows businesses to position themselves competitively in this lucrative market.

Competitive Landscape:

In the global orthopedic implants market, key market players are actively engaged in various strategies and initiatives to maintain and enhance their positions. Market leaders invest heavily in research and development to introduce innovative orthopedic implant products. This includes developing implants with advanced materials, designs, and features to improve patient outcomes and surgeon satisfaction. Key players often expand their product portfolios through acquisitions, mergers, and partnerships. This allows them to offer a comprehensive range of orthopedic implants, catering to various segments such as joint replacements, spine implants, trauma implants, and dental implants. Companies are expanding their global presence by entering new markets and

regions. This involves securing regulatory approvals, establishing distribution networks, and adapting products to meet specific regional needs. Collaborations with healthcare institutions, research organizations, and orthopedic surgeons help key players gain insights into market trends, patient needs, and emerging technologies. Such alliances can also lead to the development of customized solutions.

The market research report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Arthrex Inc.
Auxein Medical
B. Braun Melsungen AG
CONMED Corporation
Globus Medical Inc.
Integra LifeSciences
Johnson & Johnson
Medtronic Plc
Narang Medical Limited
Orthopaedic Implant Company
Smith & Nephew plc
Stryker Corporation
Zimmer Biomet

Recent Developments:

In March 2023, Zimmer Biomet Holdings, Inc. (NYSE and SIX: ZBH), a global medical technology leader, announced plans to unveil the latest enhancements to ZBEdge™ Dynamic Intelligence™ at the American Academy of Orthopaedic Surgeon's (AAOS) 2023 Annual Meeting in Las Vegas.

In February 2022, the Johnson & Johnson Medical Devices Companies announced that DePuy Synthes has acquired CrossRoads® Extremity Systems, a Tennessee-based foot and ankle company that provides a broad range of procedure-specific, sterile-packed implants and instrumentation systems cleared for lower extremity indications.

In February 2022, Stryker (NYSE: SYK) announced that it has completed the previously announced acquisition of Vocera Communications, Inc. (NYSE: VCRA), a leader in digital care coordination and communication.

Key Questions Answered in This Report

1. What was the size of the global orthopedic implants market in 2023?
2. What is the expected growth rate of the global orthopedic implants market during 2024-2032?
3. What has been the impact of COVID-19 on the global orthopedic implants market?
4. What are the key factors driving the global orthopedic implants market?
5. What is the breakup of the global orthopedic implants market based on the product?
6. What is the breakup of the global orthopedic implants market based on the type?
7. What is the breakup of the global orthopedic implants market based on the biomaterial?
8. What are the key regions in the global orthopedic implants market?
9. Who are the key players/companies in the global orthopedic implants market?

Contents

1 PREFACE

2 SCOPE AND METHODOLOGY

- 2.1 Objectives of the Study
- 2.2 Stakeholders
- 2.3 Data Sources
 - 2.3.1 Primary Sources
 - 2.3.2 Secondary Sources
- 2.4 Market Estimation
 - 2.4.1 Bottom-Up Approach
 - 2.4.2 Top-Down Approach
- 2.5 Forecasting Methodology

3 EXECUTIVE SUMMARY

4 INTRODUCTION

- 4.1 Overview
- 4.2 Key Industry Trends

5 GLOBAL ORTHOPEDIC IMPLANTS MARKET

- 5.1 Market Overview
- 5.2 Market Performance
- 5.3 Impact of COVID-19
- 5.4 Market Forecast

6 MARKET BREAKUP BY PRODUCT

- 6.1 Reconstructive Joint Replacements
 - 6.1.1 Market Trends
 - 6.1.2 Key Segments
 - 6.1.2.1 Knee Replacement Implants
 - 6.1.2.2 Hip Replacement Implants
 - 6.1.2.3 Extremities
 - 6.1.3 Market Forecast

6.2 Spinal Implants

6.2.1 Market Trends

6.2.2 Key Segments

6.2.2.1 Spinal Fusion Implants

6.2.2.2 Vertebral Compression Fracture (VCF) Devices

6.2.2.3 Motion Preservation Devices/Non-Fusion Devices

6.2.3 Market Forecast

6.3 Dental Implants

6.3.1 Market Trends

6.3.2 Key Segments

6.3.2.1 Root Form Dental Implants

6.3.2.2 Plate Form Dental Implants

6.3.3 Market Forecast

6.4 Trauma

6.4.1 Market Trends

6.4.2 Market Forecast

6.5 Orthobiologics

6.5.1 Market Trends

6.5.2 Key Segments

6.5.2.1 Demineralized Bone Matrix (DBM)

6.5.2.2 Allograft

6.5.2.3 Bone Morphogenetic Protein (BMP)

6.5.2.4 Viscosupplementation Products

6.5.2.5 Synthetic Bone Substitutes

6.5.2.6 Others

6.5.3 Market Forecast

6.6 Others

6.6.1 Market Trends

6.6.2 Market Forecast

7 MARKET BREAKUP BY TYPE

7.1 Knee

7.1.1 Market Trends

7.1.2 Market Forecast

7.2 Hip

7.2.1 Market Trends

7.2.2 Market Forecast

7.3 Wrist and Shoulder

- 7.3.1 Market Trends
- 7.3.2 Market Forecast
- 7.4 Dental
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast
- 7.5 Spine
 - 7.5.1 Market Trends
 - 7.5.2 Market Forecast
- 7.6 Ankle
 - 7.6.1 Market Trends
 - 7.6.2 Market Forecast
- 7.7 Others
 - 7.7.1 Market Trends
 - 7.7.2 Market Forecast

8 MARKET BREAKUP BY BIOMATERIAL

- 8.1 Metallic Biomaterials
 - 8.1.1 Market Trends
 - 8.1.2 Key Segments
 - 8.1.2.1 Stainless Steel
 - 8.1.2.2 Titanium Alloy
 - 8.1.2.3 Cobalt Alloy
 - 8.1.2.4 Others
 - 8.1.3 Market Forecast
- 8.2 Ceramic Biomaterials
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 Polymers Biomaterials
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast
- 8.4 Others
 - 8.4.1 Market Trends
 - 8.4.2 Market Forecast

9 MARKET BREAKUP BY END USER

- 9.1 Hospitals
 - 9.1.1 Market Trends

- 9.1.2 Market Forecast
- 9.2 Orthopedic Clinic
 - 9.2.1 Market Trends
 - 9.2.2 Market Forecast
- 9.3 Ambulatory Surgical Centers
 - 9.3.1 Market Trends
 - 9.3.2 Market Forecast
- 9.4 Others
 - 9.4.1 Market Trends
 - 9.4.2 Market Forecast

10 MARKET BREAKUP BY REGION

- 10.1 North America
 - 10.1.1 United States
 - 10.1.1.1 Market Trends
 - 10.1.1.2 Market Forecast
 - 10.1.2 Canada
 - 10.1.2.1 Market Trends
 - 10.1.2.2 Market Forecast
- 10.2 Asia-Pacific
 - 10.2.1 China
 - 10.2.1.1 Market Trends
 - 10.2.1.2 Market Forecast
 - 10.2.2 Japan
 - 10.2.2.1 Market Trends
 - 10.2.2.2 Market Forecast
 - 10.2.3 India
 - 10.2.3.1 Market Trends
 - 10.2.3.2 Market Forecast
 - 10.2.4 South Korea
 - 10.2.4.1 Market Trends
 - 10.2.4.2 Market Forecast
 - 10.2.5 Australia
 - 10.2.5.1 Market Trends
 - 10.2.5.2 Market Forecast
 - 10.2.6 Indonesia
 - 10.2.6.1 Market Trends
 - 10.2.6.2 Market Forecast

- 10.2.7 Others
 - 10.2.7.1 Market Trends
 - 10.2.7.2 Market Forecast
- 10.3 Europe
 - 10.3.1 Germany
 - 10.3.1.1 Market Trends
 - 10.3.1.2 Market Forecast
 - 10.3.2 France
 - 10.3.2.1 Market Trends
 - 10.3.2.2 Market Forecast
 - 10.3.3 United Kingdom
 - 10.3.3.1 Market Trends
 - 10.3.3.2 Market Forecast
 - 10.3.4 Italy
 - 10.3.4.1 Market Trends
 - 10.3.4.2 Market Forecast
 - 10.3.5 Spain
 - 10.3.5.1 Market Trends
 - 10.3.5.2 Market Forecast
 - 10.3.6 Russia
 - 10.3.6.1 Market Trends
 - 10.3.6.2 Market Forecast
 - 10.3.7 Others
 - 10.3.7.1 Market Trends
 - 10.3.7.2 Market Forecast
- 10.4 Latin America
 - 10.4.1 Brazil
 - 10.4.1.1 Market Trends
 - 10.4.1.2 Market Forecast
 - 10.4.2 Mexico
 - 10.4.2.1 Market Trends
 - 10.4.2.2 Market Forecast
 - 10.4.3 Others
 - 10.4.3.1 Market Trends
 - 10.4.3.2 Market Forecast
- 10.5 Middle East and Africa
 - 10.5.1 Market Trends
 - 10.5.2 Market Breakup by Country
 - 10.5.3 Market Forecast

11 SWOT ANALYSIS

- 11.1 Overview
- 11.2 Strengths
- 11.3 Weaknesses
- 11.4 Opportunities
- 11.5 Threats

12 VALUE CHAIN ANALYSIS

13 PORTERS FIVE FORCES ANALYSIS

- 13.1 Overview
- 13.2 Bargaining Power of Buyers
- 13.3 Bargaining Power of Suppliers
- 13.4 Degree of Competition
- 13.5 Threat of New Entrants
- 13.6 Threat of Substitutes

14 PRICE ANALYSIS

15 COMPETITIVE LANDSCAPE

- 15.1 Market Structure
- 15.2 Key Players
- 15.3 Profiles of Key Players
 - 15.3.1 Arthrex Inc.
 - 15.3.1.1 Company Overview
 - 15.3.1.2 Product Portfolio
 - 15.3.1.3 SWOT Analysis
 - 15.3.2 Auxein Medical
 - 15.3.2.1 Company Overview
 - 15.3.2.2 Product Portfolio
 - 15.3.3 B. Braun Melsungen AG
 - 15.3.3.1 Company Overview
 - 15.3.3.2 Product Portfolio
 - 15.3.3.3 SWOT Analysis
 - 15.3.4 CONMED Corporation

- 15.3.4.1 Company Overview
- 15.3.4.2 Product Portfolio
- 15.3.4.3 Financials
- 15.3.4.4 SWOT Analysis
- 15.3.5 Globus Medical Inc.
 - 15.3.5.1 Company Overview
 - 15.3.5.2 Product Portfolio
 - 15.3.5.3 Financials
 - 15.3.5.4 SWOT Analysis
- 15.3.6 Integra LifeSciences
 - 15.3.6.1 Company Overview
 - 15.3.6.2 Product Portfolio
 - 15.3.6.3 Financials
 - 15.3.6.4 SWOT Analysis
- 15.3.7 Johnson & Johnson
 - 15.3.7.1 Company Overview
 - 15.3.7.2 Product Portfolio
 - 15.3.7.3 Financials
 - 15.3.7.4 SWOT Analysis
- 15.3.8 Medtronic Plc
 - 15.3.8.1 Company Overview
 - 15.3.8.2 Product Portfolio
 - 15.3.8.3 Financials
 - 15.3.8.4 SWOT Analysis
- 15.3.9 Narang Medical Limited
 - 15.3.9.1 Company Overview
 - 15.3.9.2 Product Portfolio
- 15.3.10 Orthopaedic Implant Company
 - 15.3.10.1 Company Overview
 - 15.3.10.2 Product Portfolio
- 15.3.11 Smith & Nephew plc
 - 15.3.11.1 Company Overview
 - 15.3.11.2 Product Portfolio
 - 15.3.11.3 Financials
 - 15.3.11.4 SWOT Analysis
- 15.3.12 Stryker Corporation
 - 15.3.12.1 Company Overview
 - 15.3.12.2 Product Portfolio
 - 15.3.12.3 Financials

- 15.3.12.4 SWOT Analysis
- 15.3.13 Zimmer Biomet
 - 15.3.13.1 Company Overview
 - 15.3.13.2 Product Portfolio
 - 15.3.13.3 Financials
 - 15.3.13.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Orthopedic Implants Market: Key Industry Highlights, 2023 & 2032

Table 2: Global: Orthopedic Implants Market Forecast: Breakup by Product (in Million US\$), 2024-2032

Table 3: Global: Orthopedic Implants Market Forecast: Breakup by Type (in Million US\$), 2024-2032

Table 4: Global: Orthopedic Implants Market Forecast: Breakup by Biomaterial (in Million US\$), 2024-2032

Table 5: Global: Orthopedic Implants Market Forecast: Breakup by End User (in Million US\$), 2024-2032

Table 6: Global: Orthopedic Implants Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 7: Global: Orthopedic Implants Market: Competitive Structure

Table 8: Global: Orthopedic Implants Market: Key Players

List Of Figures

LIST OF FIGURES

- Figure 1: Global: Orthopedic Implants Market: Major Drivers and Challenges
- Figure 2: Global: Orthopedic Implants Market: Sales Value (in Billion US\$), 2018-2023
- Figure 3: Global: Orthopedic Implants Market Forecast: Sales Value (in Billion US\$), 2024-2032
- Figure 4: Global: Orthopedic Implants Market: Breakup by Product (in %), 2023
- Figure 5: Global: Orthopedic Implants Market: Breakup by Type (in %), 2023
- Figure 6: Global: Orthopedic Implants Market: Breakup by Biomaterial (in %), 2023
- Figure 7: Global: Orthopedic Implants Market: Breakup by End User (in %), 2023
- Figure 8: Global: Orthopedic Implants Market: Breakup by Region (in %), 2023
- Figure 9: Global: Orthopedic Implants (Reconstructive Joint Replacements) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 10: Global: Orthopedic Implants (Reconstructive Joint Replacements) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 11: Global: Orthopedic Implants (Spinal Implants) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 12: Global: Orthopedic Implants (Spinal Implants) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 13: Global: Orthopedic Implants (Dental Implants) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 14: Global: Orthopedic Implants (Dental Implants) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 15: Global: Orthopedic Implants (Trauma) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 16: Global: Orthopedic Implants (Trauma) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 17: Global: Orthopedic Implants (Orthobiologics) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 18: Global: Orthopedic Implants (Orthobiologics) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 19: Global: Orthopedic Implants (Other Products) Market: Sales Value (in Million US\$), 2018 & 2023
- Figure 20: Global: Orthopedic Implants (Other Products) Market Forecast: Sales Value (in Million US\$), 2024-2032
- Figure 21: Global: Orthopedic Implants (Knee) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 22: Global: Orthopedic Implants (Knee) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 23: Global: Orthopedic Implants (Hip) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 24: Global: Orthopedic Implants (Hip) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 25: Global: Orthopedic Implants (Wrist and Shoulder) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 26: Global: Orthopedic Implants (Wrist and Shoulder) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 27: Global: Orthopedic Implants (Dental) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 28: Global: Orthopedic Implants (Dental) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 29: Global: Orthopedic Implants (Spine) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 30: Global: Orthopedic Implants (Spine) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 31: Global: Orthopedic Implants (Ankle) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 32: Global: Orthopedic Implants (Ankle) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 33: Global: Orthopedic Implants (Other Types) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 34: Global: Orthopedic Implants (Other Types) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 35: Global: Orthopedic Implants (Metallic Biomaterials) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 36: Global: Orthopedic Implants (Metallic Biomaterials) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 37: Global: Orthopedic Implants (Ceramic Biomaterials) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 38: Global: Orthopedic Implants (Ceramic Biomaterials) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 39: Global: Orthopedic Implants (Polymers Biomaterials) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 40: Global: Orthopedic Implants (Polymers Biomaterials) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 41: Global: Orthopedic Implants (Other Biomaterials) Market: Sales Value (in

Million US\$), 2018 & 2023

Figure 42: Global: Orthopedic Implants (Other Biomaterials) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 43: Global: Orthopedic Implants (Hospitals) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 44: Global: Orthopedic Implants (Hospitals) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 45: Global: Orthopedic Implants (Orthopedic Clinic) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 46: Global: Orthopedic Implants (Orthopedic Clinic) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 47: Global: Orthopedic Implants (Ambulatory Surgical Centers) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 48: Global: Orthopedic Implants (Ambulatory Surgical Centers) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 49: Global: Orthopedic Implants (Other End Users) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 50: Global: Orthopedic Implants (Other End Users) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 51: North America: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 52: North America: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 53: United States: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 54: United States: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 55: Canada: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 56: Canada: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 57: Asia-Pacific: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 58: Asia-Pacific: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 59: China: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 60: China: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 61: Japan: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 62: Japan: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 63: India: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 64: India: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 65: South Korea: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 66: South Korea: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 67: Australia: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 68: Australia: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 69: Indonesia: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 70: Indonesia: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 71: Others: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 72: Others: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 73: Europe: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 74: Europe: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 75: Germany: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 76: Germany: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 77: France: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 78: France: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 79: United Kingdom: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 80: United Kingdom: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 81: Italy: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 82: Italy: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 83: Spain: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 84: Spain: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 85: Russia: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 86: Russia: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 87: Others: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 88: Others: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 89: Latin America: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 90: Latin America: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 91: Brazil: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 92: Brazil: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 93: Mexico: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 94: Mexico: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 95: Others: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 96: Others: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 97: Middle East and Africa: Orthopedic Implants Market: Sales Value (in Million US\$), 2018 & 2023

Figure 98: Middle East and Africa: Orthopedic Implants Market: Breakup by Country (in %), 2023

Figure 99: Middle East and Africa: Orthopedic Implants Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 100: Global: Orthopedic Implants Industry: SWOT Analysis

Figure 101: Global: Orthopedic Implants Industry: Value Chain Analysis

Figure 102: Global: Orthopedic Implants Industry: Porter's Five Forces Analysis

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