

Orthopedic Soft Tissue Repair Market Report by Procedure (Cruciate Ligaments Repair, Rotator Cuff Repair, Lateral Epicondylitis, Achilles Tendinosis Repair, Pelvic Organ Prolapse, Gluteal Tendon Repair, Hip Arthroscopy, Biceps Tenodesis, and Others), Injury Location (Knee, Shoulder, Hip, Small Joints), End User (Hospitals, Ambulatory Centers, Orthopedic Clinics), and Region 2024-2032

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Abstracts

The global orthopedic soft tissue repair market size reached US\$ 3.6 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 5.2 Billion by 2032, exhibiting a growth rate (CAGR) of 4.1% during 2024-2032. The rising geriatric population, continuous technological advancements in the medical sector, growing participation in sports activities, etc., are some of the major factors propelling the market growth.

Orthopedic Soft Tissue Repair Market Analysis:

Major Market Drivers: The growing participation of individuals in professional sports has significantly increased the risks of sports-related injuries, which, in turn, is facilitating the orthopedic soft tissue repair market demand. Moreover, the introduction of new therapies, such as platelet-rich plasma, that are effective in managing complex neuromuscular pain caused due to orthopedic ligament tears is proliferating the industry's growth.

Key Market Trends: The increasing penetration of advanced technologies,

including bioprinting, biological meshes, and bio-fabrication is anticipated to proliferate the orthopedic soft tissue repair market demand. In addition, extensive research and development (R&D) activities, innovations in new devices and therapies, and increasing healthcare per capita expenditure, are also contributing to the market growth.

Competitive Landscape: Some of the leading orthopedic soft tissue repair market companies are Arthrex Inc., Becton Dickinson and Company, Boston Scientific Corporation, CONMED Corporation, Integra LifeSciences, Johnson & Johnson, LifeNet Health, MTF Biologics, Smith & Nephew plc, Stryker Corporation, Tissue Regenix Group plc, and Zimmer Biomet, among others.

Geographical Trends: The North America and Europe markets hold prominent shares of the orthopedic soft tissue repair market. Numerous factors, such as a large aging population, high prevalence of sports-related injuries, advanced healthcare infrastructure, and robust reimbursement systems, contribute to the market growth in these regions. Moreover, in the Asia Pacific region, improving healthcare infrastructures, rising disposable incomes, and growing awareness of advanced treatment options drive the market expansion.

Challenges and Opportunities: Cost containment of soft tissue procedures, regulatory hurdles, technological complexity, and high competition among key players are some of the major challenges that the market is facing. However, ongoing research and development efforts lead to the development of innovative technologies and biomaterials for soft tissue repair, improving procedural outcomes and patient recovery times, thereby escalating the industry demand.

Orthopedic Soft Tissue Repair Market Trends:

Rising Incidences of Orthopedic Injuries

The increasing occurrence of orthopedic injuries is significantly propelling the orthopedic soft tissue repair market forward. Rising participation in physical activities and sports is leading to a rise in the incidence of orthopedic injuries. According to the National Athletic Trainers' Association, around 30 million children participated in organized sports in the United States in 2022. This figure has risen over time, as youth sports leagues have grown in popularity. This is further escalating the number of sports injuries. For instance, according to an article published by the Centers for Disease Control and

Prevention (CDC), over 3.5 million sports-related injuries occur each year in the United States. In addition to this, a study conducted in Canada in 2022 revealed a significant percentage of injuries among contact sports participants in Canadian high schools. The survey also found that injury rates varied from 12.7 per 100 participants per year in rugby to 33.1 per 100 participants per year in ice hockey. The prevalence rate of head injuries was 33.3%; wrist or hand injuries were 16.0%; shoulder injuries were 12.8%; and knee injuries were 12.0%. This covers both minor and catastrophic injuries. As people engage in more physical activities and sports, the likelihood of sustaining soft tissue injuries rises. These injuries can range from ligament tears to tendon ruptures, requiring surgical intervention for repair. Apart from this, the aging population, coupled with a higher prevalence of chronic conditions such as osteoarthritis, also drives the demand for orthopedic interventions, including soft tissue repair. For instance, according to an article published by the Cleveland Clinic, more than 80% of adults older than 55 had osteoarthritis. Furthermore, with growing awareness about the importance of orthopedic health and advancements in medical knowledge, more people are seeking treatment for orthopedic injuries, driving the demand for soft tissue repair procedures. These factors are bolstering the orthopedic soft tissue market revenue.

Escalating Geriatric Population and Obesity Rates

The rise in the aging population and chronic disease occurrences is significantly driving the soft tissue repair market. For instance, according to the World Health Organization, by 2030, one in every six persons in the world will be 60 or older. At this time, the proportion of the population aged 60 and up would rise from 1 billion in 2020 to 1.4 billion. By 2050, the global population of people aged 60 and up would double (2.1 billion). The number of people aged 80 and older was anticipated to treble between 2020 and 2050, reaching 426 million. The significant rise in obesity rates is leading to the increasing incidence of chronic diseases such as diabetes, and cardiovascular and kidney-related illnesses. For instance, according to a report published by the World Health Organization in 2023, in 2014, 8.5% of adults aged 18 and up had diabetes. In 2019, diabetes was the direct cause of 1.5 million fatalities, with 48% occurring before the age of 70. Diabetes caused an additional 460,000 renal disease deaths, and high blood glucose was responsible for approximately 20% of cardiovascular fatalities. Between 2000 and 2019, age-standardized diabetes mortality rates increased by 3%. Diabetes-related mortality has increased by 13% in low- and middle-income nations. Moreover, according to an article published by the American Academy of Orthopedic Surgeons, obesity is usually associated with soft tissue injury and osteoarthritis, a degenerative wear and tear condition of the joints. Obesity has a significant impact on osteoarthritis of the hip and knee joints. Every pound of human weight applies four to six

pounds of pressure on each knee joint. Obese people are 20 times more likely to require a knee replacement than those who are not overweight. These factors are further contributing to the orthopedic soft tissue repair market share.

Technological Advancements

Technological advancements play a crucial role in driving the growth of the orthopedic soft tissue repair market. These advancements contribute to the development of more effective and less invasive treatment options, enhancing patient outcomes and reducing recovery times. Moreover, technological innovations have led to the development of minimally invasive surgical techniques, such as arthroscopy and laparoscopy, which reduce trauma to surrounding tissues, minimize scarring, and accelerate recovery times compared to traditional open surgeries. For instance, in July 2023, Smith+Nephew, the worldwide medical technology business, launched REGENETEN bioinductive implant in India. The REGENETEN implant has transformed the way surgeons approach rotator cuff surgeries, with over 100,000 procedures conducted globally since its inception. The collagen-based REGENETEN bioinductive implant stimulated the body's natural healing response, allowing the development of new tendon-like tissue to naturally enhance the current tendon and alter disease progression. The implant, roughly the size of a postage stamp is delivered arthroscopically through a small incision over the region of the rotator cuff tendon injury. Apart from this, various developments by the key players are also enhancing the demand for tissue repair. For example, in August 2021, Orthopaedic Implant Company introduced its FDA-cleared DRPX wrist fracture plate, which features type II anodized titanium and a low-profile plate and screw design to reduce soft tissue impingement. These factors are positively influencing the orthopedic soft tissue repair market forecast.

Orthopedic Soft Tissue Repair Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global orthopedic soft tissue repair market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on procedure, injury location, and end user.

Breakup by Procedure:

Cruciate Ligaments Repair

Rotator Cuff Repair

Lateral Epicondylitis

Achilles Tendinosis Repair

Pelvic Organ Prolapse

Gluteal Tendon Repair

Hip Arthroscopy

Biceps Tenodesis

Others

The report has provided a detailed breakup and analysis of the market based on the procedure. This includes cruciate ligaments repair, rotator cuff repair, lateral epicondylitis, achilles tendinosis repair, pelvic organ prolapse, gluteal tendon repair, hip arthroscopy, biceps tenodesis, and others.

According to the orthopedic soft tissue repair market outlook, cruciate ligaments repair is commonly performed to reconstruct a torn anterior cruciate ligament (ACL) in the knee, which often occurs during sports injuries. Demand for this procedure tends to be consistent due to the prevalence of sports-related injuries. While rotator cuff repair is a group of muscles and tendons that stabilize the shoulder joint. Tears in the rotator cuff are common, especially among older adults and athletes engaged in overhead activities. The demand for rotator cuff repair remains steady due to the aging population and continued participation in sports. Moreover, lateral epicondylitis, commonly known as tennis elbow, is inflammation of the tendons that join the forearm muscles on the outside of the elbow. Treatment options include conservative measures like rest, physical therapy, and corticosteroid injections, but in some cases, surgical intervention may be necessary.

Breakup by Injury Location:

Knee

Shoulder

Hip

Small Joints

A detailed breakup and analysis of the market based on the injury location have also been provided in the report. This includes knee, shoulder, hip, and small joints.

According to the orthopedic soft tissue repair market outlook, the demand for soft tissue repair procedures in the knee, shoulder, hip, and small joints can vary based on several factors, including the prevalence of injuries, demographic trends, advancements in surgical techniques, and changes in patient preferences. There has been a noted increase in the incidence of ACL knee tears, especially among young athletes participating in high-impact sports like soccer, basketball, and football. Factors contributing to this rise may include increased sports participation, year-round training, and higher intensity levels. Moreover, there has been a rise in rotator cuff injuries in the shoulder, particularly among individuals over 40, possibly due to aging demographics, increased sports participation among older adults, and occupational demands.

Breakup by End User:

Hospitals

Ambulatory Centers

Orthopedic Clinics

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

Hospitals often handle acute soft tissue injuries requiring immediate attention, such as traumatic ligament tears, tendon ruptures, or severe joint dislocations. Soft tissue repair procedures performed in hospitals may include complex surgeries or revisions. Hospitals can accommodate patients requiring overnight stays or post-operative monitoring, which may be necessary for certain soft tissue repair procedures with extended recovery periods or higher risk profiles. Moreover, ASCs are increasingly popular for performing elective soft tissue repair procedures that do not require

overnight hospitalization, such as arthroscopic surgeries for meniscal tears or rotator cuff repairs. Apart from this, orthopedic clinics focus exclusively on musculoskeletal conditions and surgeries, including soft tissue repair procedures. Patients seeking specialized orthopedic care may prefer these clinics for comprehensive evaluations, treatment planning, and post-operative rehabilitation.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

The market research 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, Russia, 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 orthopedic soft tissue market statistics, the North America region, including the United States and Canada, has well-established medical systems with high levels of healthcare expenditure. Factors such as a large aging population, increasing sports participation, and advancements in medical technology drive the demand for orthopedic soft tissue repair procedures. Moreover, in Europe, countries like Germany, France, and the United Kingdom, have sophisticated healthcare infrastructure and high demand for orthopedic procedures. Additionally, the orthopedic soft tissue repair market in the Asia Pacific region is rapidly expanding due to urbanization, the aging population, and increasing healthcare expenditures. The government's healthcare reforms and investments in medical infrastructure further boost the market growth.

Competitive Landscape:

The competitive landscape of the industry has also been examined along with the profiles of the key players that are:

Arthrex Inc.

Becton Dickinson and Company

Boston Scientific Corporation

CONMED Corporation

Integra LifeSciences

Johnson & Johnson

LifeNet Health

MTF Biologics

Smith & Nephew plc

Stryker Corporation

Tissue Regenix Group plc

Zimmer Biomet

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Orthopedic Soft Tissue Repair Market Recent Developments:

June 2024: Stryker Corporation, a medical technology firm, acquired Artelon, a soft tissue fixation products provider. The agreement was aimed at enhancing Stryker's offerings in the sports medicine segment.

May 2024: The Center of Generative Medicine at the Hospital for Special Surgery, with a sub-site at Emory University, conducted a trial to investigate whether using concentrated bone marrow aspirate could help patients to heal more effectively.

May 2024: The Palm Beach Orthopedic Institute stated that a board-certified specialist in orthopedic care made a significant contribution to orthopedic surgery by performing his first procedure with the X-Twist Fixation System with bio composite anchors. This process involves advanced procedures ranging from single or double-row repairs to knotless and completely knotted structures for soft tissue and bone repairs.

Key Questions Answered in This Report:

How has the global orthopedic soft tissue repair market performed so far and how will it perform in the coming years?

What has been the impact of COVID-19 on the global orthopedic soft tissue repair market?

What are the key regional markets?

What is the breakup of the market based on the procedure?

What is the breakup of the market based on the injury location?

What is the breakup of the market based on the end user?

What are the various stages in the value chain of the industry?

What are the key driving factors and challenges in the industry?

What is the structure of the global orthopedic soft tissue repair market and who are the key players?

What is the degree of competition in the industry?

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 SOFT TISSUE REPAIR MARKET

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

6 MARKET BREAKUP BY PROCEDURE

- 6.1 Cruciate Ligaments Repair
 - 6.1.1 Market Trends
 - 6.1.2 Market Forecast
- 6.2 Rotator Cuff Repair
 - 6.2.1 Market Trends
 - 6.2.2 Market Forecast
- 6.3 Lateral Epicondylitis

- 6.3.1 Market Trends
- 6.3.2 Market Forecast
- 6.4 Achilles Tendinosis Repair
 - 6.4.1 Market Trends
 - 6.4.2 Market Forecast
- 6.5 Pelvic Organ Prolapse
 - 6.5.1 Market Trends
 - 6.5.2 Market Forecast
- 6.6 Gluteal Tendon Repair
 - 6.6.1 Market Trends
 - 6.6.2 Market Forecast
- 6.7 Hip Arthroscopy
 - 6.7.1 Market Trends
 - 6.7.2 Market Forecast
- 6.8 Biceps Tenodesis
 - 6.8.1 Market Trends
 - 6.8.2 Market Forecast
- 6.9 Others
 - 6.9.1 Market Trends
 - 6.9.2 Market Forecast

7 MARKET BREAKUP BY INJURY LOCATION

- 7.1 Knee
 - 7.1.1 Market Trends
 - 7.1.2 Market Forecast
- 7.2 Shoulder
 - 7.2.1 Market Trends
 - 7.2.2 Market Forecast
- 7.3 Hip
 - 7.3.1 Market Trends
 - 7.3.2 Market Forecast
- 7.4 Small Joints
 - 7.4.1 Market Trends
 - 7.4.2 Market Forecast

8 MARKET BREAKUP BY END USER

- 8.1 Hospitals

- 8.1.1 Market Trends
- 8.1.2 Market Forecast
- 8.2 Ambulatory Centers
 - 8.2.1 Market Trends
 - 8.2.2 Market Forecast
- 8.3 Orthopedic Clinics
 - 8.3.1 Market Trends
 - 8.3.2 Market Forecast

9 MARKET BREAKUP BY REGION

- 9.1 North America
 - 9.1.1 United States
 - 9.1.1.1 Market Trends
 - 9.1.1.2 Market Forecast
 - 9.1.2 Canada
 - 9.1.2.1 Market Trends
 - 9.1.2.2 Market Forecast
- 9.2 Asia-Pacific
 - 9.2.1 China
 - 9.2.1.1 Market Trends
 - 9.2.1.2 Market Forecast
 - 9.2.2 Japan
 - 9.2.2.1 Market Trends
 - 9.2.2.2 Market Forecast
 - 9.2.3 India
 - 9.2.3.1 Market Trends
 - 9.2.3.2 Market Forecast
 - 9.2.4 South Korea
 - 9.2.4.1 Market Trends
 - 9.2.4.2 Market Forecast
 - 9.2.5 Australia
 - 9.2.5.1 Market Trends
 - 9.2.5.2 Market Forecast
 - 9.2.6 Indonesia
 - 9.2.6.1 Market Trends
 - 9.2.6.2 Market Forecast
 - 9.2.7 Others
 - 9.2.7.1 Market Trends

9.2.7.2 Market Forecast

9.3 Europe

9.3.1 Germany

9.3.1.1 Market Trends

9.3.1.2 Market Forecast

9.3.2 France

9.3.2.1 Market Trends

9.3.2.2 Market Forecast

9.3.3 United Kingdom

9.3.3.1 Market Trends

9.3.3.2 Market Forecast

9.3.4 Italy

9.3.4.1 Market Trends

9.3.4.2 Market Forecast

9.3.5 Spain

9.3.5.1 Market Trends

9.3.5.2 Market Forecast

9.3.6 Russia

9.3.6.1 Market Trends

9.3.6.2 Market Forecast

9.3.7 Others

9.3.7.1 Market Trends

9.3.7.2 Market Forecast

9.4 Latin America

9.4.1 Brazil

9.4.1.1 Market Trends

9.4.1.2 Market Forecast

9.4.2 Mexico

9.4.2.1 Market Trends

9.4.2.2 Market Forecast

9.4.3 Others

9.4.3.1 Market Trends

9.4.3.2 Market Forecast

9.5 Middle East and Africa

9.5.1 Market Trends

9.5.2 Market Breakup by Country

9.5.3 Market Forecast

10 SWOT ANALYSIS

- 10.1 Overview
- 10.2 Strengths
- 10.3 Weaknesses
- 10.4 Opportunities
- 10.5 Threats

11 VALUE CHAIN ANALYSIS

12 PORTERS FIVE FORCES ANALYSIS

- 12.1 Overview
- 12.2 Bargaining Power of Buyers
- 12.3 Bargaining Power of Suppliers
- 12.4 Degree of Competition
- 12.5 Threat of New Entrants
- 12.6 Threat of Substitutes

13 PRICE ANALYSIS

14 COMPETITIVE LANDSCAPE

- 14.1 Market Structure
- 14.2 Key Players
- 14.3 Profiles of Key Players
 - 14.3.1 Arthrex Inc.
 - 14.3.1.1 Company Overview
 - 14.3.1.2 Product Portfolio
 - 14.3.1.3 SWOT Analysis
 - 14.3.2 Becton Dickinson and Company
 - 14.3.2.1 Company Overview
 - 14.3.2.2 Product Portfolio
 - 14.3.2.3 Financials
 - 14.3.2.4 SWOT Analysis
 - 14.3.3 Boston Scientific Corporation
 - 14.3.3.1 Company Overview
 - 14.3.3.2 Product Portfolio
 - 14.3.3.3 Financials
 - 14.3.4 CONMED Corporation

- 14.3.4.1 Company Overview
- 14.3.4.2 Product Portfolio
- 14.3.4.3 Financials
- 14.3.4.4 SWOT Analysis
- 14.3.5 Integra LifeSciences
 - 14.3.5.1 Company Overview
 - 14.3.5.2 Product Portfolio
 - 14.3.5.3 Financials
 - 14.3.5.4 SWOT Analysis
- 14.3.6 Johnson & Johnson
 - 14.3.6.1 Company Overview
 - 14.3.6.2 Product Portfolio
 - 14.3.6.3 Financials
 - 14.3.6.4 SWOT Analysis
- 14.3.7 LifeNet Health
 - 14.3.7.1 Company Overview
 - 14.3.7.2 Product Portfolio
- 14.3.8 MTF Biologics
 - 14.3.8.1 Company Overview
 - 14.3.8.2 Product Portfolio
- 14.3.9 Smith & Nephew plc
 - 14.3.9.1 Company Overview
 - 14.3.9.2 Product Portfolio
 - 14.3.9.3 Financials
- 14.3.10 Stryker Corporation
 - 14.3.10.1 Company Overview
 - 14.3.10.2 Product Portfolio
 - 14.3.10.3 Financials
 - 14.3.10.4 SWOT Analysis
- 14.3.11 Tissue Regenix Group plc
 - 14.3.11.1 Company Overview
 - 14.3.11.2 Product Portfolio
 - 14.3.11.3 Financials
- 14.3.12 Zimmer Biomet
 - 14.3.12.1 Company Overview
 - 14.3.12.2 Product Portfolio
 - 14.3.12.3 Financials
 - 14.3.12.4 SWOT Analysis

List Of Tables

LIST OF TABLES

Table 1: Global: Orthopedic Soft Tissue Repair Market: Key Industry Highlights, 2023 and 2032

Table 2: Global: Orthopedic Soft Tissue Repair Market Forecast: Breakup by Procedure (in Million US\$), 2024-2032

Table 3: Global: Orthopedic Soft Tissue Repair Market Forecast: Breakup by Injury Location (in Million US\$), 2024-2032

Table 4: Global: Orthopedic Soft Tissue Repair Market Forecast: Breakup by End User (in Million US\$), 2024-2032

Table 5: Global: Orthopedic Soft Tissue Repair Market Forecast: Breakup by Region (in Million US\$), 2024-2032

Table 6: Global: Orthopedic Soft Tissue Repair Market: Competitive Structure

Table 7: Global: Orthopedic Soft Tissue Repair Market: Key Players

List Of Figures

LIST OF FIGURES

Figure 1: Global: Orthopedic Soft Tissue Repair Market: Major Drivers and Challenges

Figure 2: Global: Orthopedic Soft Tissue Repair Market: Sales Value (in Billion US\$), 2018-2023

Figure 3: Global: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Billion US\$), 2024-2032

Figure 4: Global: Orthopedic Soft Tissue Repair Market: Breakup by Procedure (in %), 2023

Figure 5: Global: Orthopedic Soft Tissue Repair Market: Breakup by Injury Location (in %), 2023

Figure 6: Global: Orthopedic Soft Tissue Repair Market: Breakup by End User (in %), 2023

Figure 7: Global: Orthopedic Soft Tissue Repair Market: Breakup by Region (in %), 2023

Figure 8: Global: Orthopedic Soft Tissue Repair (Cruciate Ligaments Repair) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 9: Global: Orthopedic Soft Tissue Repair (Cruciate Ligaments Repair) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 10: Global: Orthopedic Soft Tissue Repair (Rotator Cuff Repair) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 11: Global: Orthopedic Soft Tissue Repair (Rotator Cuff Repair) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 12: Global: Orthopedic Soft Tissue Repair (Lateral Epicondylitis) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 13: Global: Orthopedic Soft Tissue Repair (Lateral Epicondylitis) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 14: Global: Orthopedic Soft Tissue Repair (Achilles Tendinosis Repair) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 15: Global: Orthopedic Soft Tissue Repair (Achilles Tendinosis Repair) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 16: Global: Orthopedic Soft Tissue Repair (Pelvic Organ Prolapse) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 17: Global: Orthopedic Soft Tissue Repair (Pelvic Organ Prolapse) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 18: Global: Orthopedic Soft Tissue Repair (Gluteal Tendon Repair) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 19: Global: Orthopedic Soft Tissue Repair (Gluteal Tendon Repair) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 20: Global: Orthopedic Soft Tissue Repair (Hip Arthroscopy) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 21: Global: Orthopedic Soft Tissue Repair (Hip Arthroscopy) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 22: Global: Orthopedic Soft Tissue Repair (Biceps Tenodesis) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 23: Global: Orthopedic Soft Tissue Repair (Biceps Tenodesis) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 24: Global: Orthopedic Soft Tissue Repair (Other Procedures) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 25: Global: Orthopedic Soft Tissue Repair (Other Procedures) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 26: Global: Orthopedic Soft Tissue Repair (Knee) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 27: Global: Orthopedic Soft Tissue Repair (Knee) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 28: Global: Orthopedic Soft Tissue Repair (Shoulder) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 29: Global: Orthopedic Soft Tissue Repair (Shoulder) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 30: Global: Orthopedic Soft Tissue Repair (Hip) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 31: Global: Orthopedic Soft Tissue Repair (Hip) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 32: Global: Orthopedic Soft Tissue Repair (Small Joints) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 33: Global: Orthopedic Soft Tissue Repair (Small Joints) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 34: Global: Orthopedic Soft Tissue Repair (Hospitals) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 35: Global: Orthopedic Soft Tissue Repair (Hospitals) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 36: Global: Orthopedic Soft Tissue Repair (Ambulatory Centers) Market: Sales Value (in Million US\$), 2018 & 2023

Figure 37: Global: Orthopedic Soft Tissue Repair (Ambulatory Centers) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 38: Global: Orthopedic Soft Tissue Repair (Orthopedic Clinics) Market: Sales

Value (in Million US\$), 2018 & 2023

Figure 39: Global: Orthopedic Soft Tissue Repair (Orthopedic Clinics) Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 40: North America: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 41: North America: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 42: United States: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 43: United States: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 44: Canada: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 45: Canada: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 46: Asia-Pacific: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 47: Asia-Pacific: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 48: China: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 49: China: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 50: Japan: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 51: Japan: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 52: India: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 53: India: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 54: South Korea: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 55: South Korea: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 56: Australia: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 57: Australia: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 58: Indonesia: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 59: Indonesia: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 60: Others: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 61: Others: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 62: Europe: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 63: Europe: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 64: Germany: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 65: Germany: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 66: France: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 67: France: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 68: United Kingdom: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 69: United Kingdom: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 70: Italy: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 71: Italy: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 72: Spain: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 73: Spain: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 74: Russia: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 75: Russia: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 76: Others: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 77: Others: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in

Million US\$), 2024-2032

Figure 78: Latin America: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 79: Latin America: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 80: Brazil: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 81: Brazil: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 82: Mexico: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 83: Mexico: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 84: Others: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 85: Others: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 86: Middle East and Africa: Orthopedic Soft Tissue Repair Market: Sales Value (in Million US\$), 2018 & 2023

Figure 87: Middle East and Africa: Orthopedic Soft Tissue Repair Market: Breakup by Country (in %), 2023

Figure 88: Middle East and Africa: Orthopedic Soft Tissue Repair Market Forecast: Sales Value (in Million US\$), 2024-2032

Figure 89: Global: Orthopedic Soft Tissue Repair Industry: SWOT Analysis

Figure 90: Global: Orthopedic Soft Tissue Repair Industry: Value Chain Analysis

Figure 91: Global: Orthopedic Soft Tissue Repair Industry: Porter's Five Forces Analysis

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