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Spine Surgery Devices Market to 2017 - (Fusion, Non-fusion, Artificial discs, Nucleus replacement, Spinal decompression, Vertebral Compression Fractures treatment, Kyphoplasty, Spine stimulators, and Spine biologics) - Global Trends & Competitive Analysis

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Abstracts

“Spine Surgery Devices Market Forecasts to 2017 - (Fusion, Non-fusion, Artificial discs, Nucleus replacement, Spinal decompression, Vertebral Compression Fractures treatment, Kyphoplasty, Spine stimulators, and Spine biologics) - Global Trends & Competitive Analysis”

Spine surgery devices market is considered as a very important and lucrative sub segment of orthopedic industry. The global spine surgery devices market is estimated at $11,554 million in 2012 and is poised to grow at a CAGR of 5.1% to reach $14,833 million by 2017.

The spine surgery devices market is broadly segmented into five classes, such as fusion, non-fusion, spinal decompression, vertebral compression fracture treatment products and spine biologics. Fusion category can be divided into spine fusion and fixation and spinal bone stimulators. Non-fusion segment consists of motion preservation technologies such as dynamic stabilization, artificial discs, annual repair, and nucleus replacement. Spinal decompression segment consists of niche markets such as corpectomy, disectomy, foraminotomy/forminectomy and laminotomy/laminectomy. Vertebral compression factures treatment category includes market for vertebroplasty and kyphoplasty kits. Allogarfts, bone morphonenetic proteins, demineralised bone matrix, bone substitutes and machined bones, together contribute to overall category of spine biologics.

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Increasing aging population, technological advancements, rising industry players and increasing demand for MIS procedures are the major drivers which are slated to propel this market. However, the pricing pressures, economic slowdown and unstable reimbursement policies will restrict the growth of this market to a certain extent.

In 2012, North America is estimated to contribute to the largest market share of the global spine surgery devices, followed by Europe. However, the Asian countries represent the fastest growing markets due to large population, growing physicians and patient awareness about the new technologies, improving reimbursement coverage, booming medical tourism and increased purchasing power of hospitals. Moreover, economic slowdown, pricing pressures and cumbersome regulatory procedures in mature countries will compel the companies to focus on the Asian markets.

Scope of the Report

This research report categorizes the market for spine surgery devices into the following segments:

- Global spine surgery market, by technology
  - Fusion
    - Fusion and fixation
    - Spine bone stimulators
  - Non-fusion
    - Dynamic stabilization
    - Artificial discs
    - Annulus repair
    - Nucleus replacement
  - Vertebral compression fracture treatment products

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Spinal decompression

Corpectomy

Disectomy

Foraminotomy/foraminectomy

Laminotomy/laminectomy

Spine biologics

Global spine surgery market, by products

Fusion – Devices used in fusion procedures in the spinal regions such as cervical, thoracic and lumbar. Moreover, this category also includes devices from spine bone stimulators market

Cervical fusion – Anterior cervical fusion devices (plates and screws), posterior cervical fusion devices (plates, rods and pedicle screws) and interbody fusion devices (bone and non-bone)

Thoracic fusion and lumbar fusion – Anterior and posterior thoracic and lumbar fusion devices, interbody lumbar fusion devices (by approach - ALIF, PLIF, TLIF and LLIF, by fusion material – bone and non-bone)

Spine bone stimulators – It included electrical invasive and non-invasive devices. Non–invasive devices are further segmented into pulsed electromagnetic field therapy devices and Capacitive Coupling (CC) systems.

Non-fusion category – It includes motion preservation techniques such as:

Dynamic stabilization devices, namely, interspinous process spacers, pedicle screw based systems and facet replacement products

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Artificial discs – It includes two types of discs, namely, cervical discs and lumbar discs

Annulus repair products

Disc nucleus replacement products

Vertebral compression fracture treatment products – Comprises vertebroplasty and kyphoplasty devices

Spine biologics – It includes bone grafts and bone graft substitute products such as:

Allograft bones

Demineralized Bone Matrices

Bone Morphogenetic Proteins

Bone substitutes

Machined bones

The key players in this market are Medtronic (U.S.), DePuy Spine (U.S.), Synthes (U.S.), Stryker Corporation (U.S.), NuVasive (U.S.), Globus Medical (U.S.), Orthofix International (The Netherlands), Biomet Spine (U.S.), Zimmer (U.S.), Alphatec Spine (U.S.), Pioneer Surgical (U.S.), K2M (U.S.), Integra Lifesciences (U.S.), LDR Holdings (U.S.), Amedica (U.S.), Orthovita (U.S.), Exactech (U.S.), and Trans1 (U.S.).

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