

Rotator Cuff Treatment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Rotator Cuff Treatment Market size is estimated at USD 532.94 million in 2024, and is expected to reach USD 676.95 million by 2029, growing at a CAGR of 4.90% during the forecast period (2024-2029).

The major factors driving the growth of the market are the rising number of sports-related injuries and technological advancements in rotator cuff rupture devices, as well as growing public-private funding grants and educational awareness initiatives. For instance, as per the Australian Institutes of Health and Welfare, in March 2023, 52,300 sports-related injuries in Australia resulted in hospital stays yearly. Arm or shoulder fractures were the most frequent (representing 41% of all fractures, or 10,800 cases). Thus, the growing burden of shoulder and sports injuries will increase the demand for rotator cuff treatment products during the forecast period.

Further, the rotator cuff is a common shoulder injury in athletes. The increasing burden of rotator cuff is expected to contribute to market growth during the forecast period. For instance, according to the article published by the American Academy of Orthopaedic Surgeons (AAOS) in August 2022, almost 2 million people in the United States visit a healthcare provider with issues related to their rotator cuff every year. Thus, the market is expected to gain traction due to the global increase in shoulder and rotator cuff injuries.

The advancement in rotator cuff rupture devices and regulatory approval may increase their effectiveness, likely boosting market growth. For instance, in July 2023, iSmith+Nephew announced the launch of its REGENETEN Bioinductive Implant in India. With more than 100,000 procedures completed globally since its introduction, the

REGENETEN implant has significantly impacted how surgeons approach rotator cuff procedures. Thus, the launch of such implants for treating rotator cuff injuries is expected to increase access to patients and physicians during the forecast period.

Additionally, in May 2022, Embody Inc. stated that the Food and Drug Administration (FDA) granted 510(k) clearance for its TAPESTRY RC System to treat rotator cuff dysfunction. The TAPESTRY RC System, which is specifically created for arthroscopic surgeries, combines the healing benefits of the bio-integrative collagen TAPESTRY implant with simplified distribution and bioabsorbable anchor anchoring. As the number of new products receiving FDA approval and hitting the market increases, this trend is expected to impact the industry's growth over the forecast period positively.

Thus, all the aforementioned factors, such as the growing burden of shoulder injuries, technological advancements, and rising approval by the FDA, are expected to boost the market growth. However, the high cost associated with the treatment is expected to hinder market growth during the forecast period.

Rotator Cuff Treatment Market Trends

Surgical or Curative Treatment is Expected to Witness High Growth During the Forecast Period

Surgical or curative treatments to repair a rotator cuff tear include arthroscopy, open surgery, or a combination. Rotator cuff surgical treatment helps restore the shoulder's function and flexibility and relieves pain that other treatments can not control.

Surgical or curative treatment holds the largest share, which can be attributed to surgeons' increased use of shoulder arthroscopy to treat rotator cuff tears and rising knowledge of the advantages of an arthroscopic repair, such as the reduced risk of complications, quick recovery, and low rate of postoperative infections. These factors are expected to significantly contribute to the segment's growth.

Many advanced studies have been done on the treatment of rotator cuff repairs. For instance, according to a study published in BMC Surgery in July 2023, arthroscopic rotator cuff repair has gradually replaced open repair as the major surgical procedure for rotator cuff repair due to the advantages of small incisions. Further, according to the study published in the National Library of Medicine in October 2022, total arthroscopic rotator cuff repair and small incision rotator cuff repair can improve shoulder function

after rotator cuff injury in the elderly. Still, the degree of pain and complications within 72 hours after total arthroscopic rotator cuff repair is significantly better than small incision rotator cuff repair. Thus, significant benefits associated with surgical procedures in rotator cuffs are expected to boost segment growth during the forecast period.

The availability of advanced surgical equipment for rotator cuff injury and its increased adoption will likely contribute to the segment's growth. For instance, in December 2023, Inoventis GmbH, to minimize the complexity of surgical interventions, announced that the first two patients were treated with the SINEFIX Rotator Cuff Repair System as part of a pre-market clinical study in Tübingen, Germany.

The increasing research trail on the benefits of surgery for rotator cuff injury has also contributed to the segment's growth. For instance, in July 2022, Ortho Regenerative Technologies Inc. announced the initiation of patient enrollment following the completion of the first patient surgery in its United States Phase I/II rotator cuff tear repair clinical trial.

Thus, all the above-mentioned factors, such as increasing research and funding activities and technological advancement, are expected to boost market growth during the forecast period.

North America is Expected to Hold a Significant Share During the Forecast Period

North America is expected to dominate the market owing to factors such as ongoing research and commercialization of novel rotator cuff injury treatment products, favorable insurance and reimbursement policies for rotator cuff repair treatments, favorable government regulations for product commercialization, and significant participation in sports. According to a study done by the CDC, shoulder injuries account for more than 30% of all sports-related injuries. In 2022, that number was expected to increase. Thus, the huge burden of shoulder injuries in the United States is expected to boost market growth during the forecast period.

Also, rotator cuff injuries increase with age, and a growing aging population will likely boost the market. According to the study published in Hindwi Journal in October 2022, the prevalence of rotator cuff injury in middle-aged and senior adults over 60 is over 40% and rises with age. The rate of incidence will eventually rise. The increase in rotator cuff treatment in the region is driven by the increasing prevalence of chronic

diseases and orthopedic ailments, especially among the region's aging population. With the aging of the United States population, musculoskeletal diseases are becoming a greater burden every year. Thus, increasing joint disorders fueling the rotator cuff treatment requirement, boosting the market's growth.

The increasing research and development activities by the market players to establish a strong market position are anticipated to boost the market in the region. For instance, in February 2024, Springbok Analytics, a Charlottesville medical data company, received a USD 1.7 million government grant from the National Science Foundation's Small Business Innovation Research program to develop a commercially viable algorithm to detect and diagnose shoulder or rotator cuff injuries. The company received a USD 51,409 grant from the NIH in 2022 to initiate its R&D project.

Strategic activities by market players, such as research and development, product launches, and collaboration, are expected to boost market growth. For instance, in November 2022, Anika Therapeutics Inc. announced that Dr. Christopher Baker successfully performed the first Integrity Implant System surgeries at the Florida Orthopaedic Institute in Tampa, FL. Integrity, comprised of a hyaluronic acid-based scaffold with bone and tendon fixation components and single-use arthroscopic delivery instruments, is designed to protect an injured tendon and promote healing in rotator cuff repair.

Therefore, owing to the aforementioned factors, growing rotator cuff injury, aging population research and development activities, and product launches, the growth of the studied market is anticipated in North America.

Rotator Cuff Treatment Industry Overview

The rotator cuff treatment market is consolidated due to the presence of a few companies operating globally and regionally. The market players engage in various strategies such as product launches, collaboration, and mergers and acquisitions. Some market players are Integra LifeSciences Corporation, Arthrex Inc., CONMED Corporation, Smith & Nephew PLC, Stryker Corporation, and KARL STORZ.

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