

Artificial Hip and Knee Joints Market - Global Industry Size, Share, Trends, Opportunity & Forecast, Segmented by Site (Hip Joints, Knee Joints), By End User (Hospitals & Surgery Centers, Orthopedic Clinics, Others), By Region & Competition, 2019-2029F

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Abstracts

Global Artificial Hip and Knee Joints Market was valued at USD 12.55 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 2.80% through 2029. The Global Artificial Hip and Knee Joints Market is a dynamic and rapidly evolving segment of the orthopedic implant industry, driven by an increasing demand for joint replacement surgeries fueled by demographic changes, technological innovations, and a rising incidence of orthopedic conditions. This market encompasses a diverse array of products, including total and partial hip and knee replacements, as well as the necessary surgical instruments.

As demographic shifts contribute to a growing population of individuals with joint disorders, and as technological advancements enhance the efficacy and longevity of implants, the Global Artificial Hip and Knee Joints Market is poised for significant growth. Additionally, heightened patient awareness and improved access to healthcare services further support this upward trajectory. To successfully navigate this dynamic landscape, stakeholders must remain agile and innovative, seizing emerging opportunities while addressing the evolving demands of both patients and healthcare providers.

Key Market Drivers

Rising Prevalence of Osteoarthritis and Other Musculoskeletal Disorders

The rising prevalence of osteoarthritis and other musculoskeletal disorders is a significant driver of growth in the global artificial hip and knee joints market. This phenomenon can be attributed to several interconnected factors that create a compelling need for orthopedic interventions. The global population is aging, with a larger proportion of individuals over the age of 65. This demographic is particularly susceptible to osteoarthritis due to the natural wear and tear of joints over time. As more individuals reach advanced age, the incidence of OA rises, leading to increased demand for joint replacement surgeries. Modern lifestyle choices, including sedentary behavior, obesity, and a lack of physical activity, contribute to the development of OA. Obesity, in particular, places additional stress on weight-bearing joints such as the hips and knees, accelerating cartilage degradation.

The rising prevalence of osteoarthritis and other musculoskeletal disorders imposes a significant burden on healthcare systems worldwide. As the number of patients requiring treatment for these conditions increases, healthcare providers face the challenge of delivering effective and timely interventions. This situation drives the demand for joint replacement surgeries as a viable solution for pain relief and improved mobility. Treating OA and its complications can be costly for healthcare systems, leading to higher overall expenditures. By investing in surgical interventions, such as artificial joint replacements, healthcare providers can reduce long-term costs associated with ongoing medical care, physical therapy, and rehabilitation. Patients suffering from osteoarthritis often experience debilitating pain and reduced mobility, which significantly impacts their quality of life. Joint replacement surgeries, specifically hip and knee replacements, are known to provide substantial pain relief and restore functionality. As awareness of these benefits grows, more patients are seeking surgical solutions, driving market demand. Increased awareness of the benefits of joint replacement, coupled with advocacy efforts, is encouraging patients to explore surgical options earlier in the disease progression. This proactive approach leads to higher surgery rates and, consequently, greater demand for artificial joints. The advancements in surgical techniques and implant technologies are making joint replacement surgeries more accessible and effective for individuals with osteoarthritis. Enhanced surgical techniques result in shorter hospital stays and faster recovery periods, making patients more inclined to opt for surgery when faced with joint-related issues. Continuous improvements in the durability and functionality of artificial joints increase patient satisfaction and encourage more individuals to pursue surgical interventions.

Joint replacement surgeries were primarily reserved for severe cases of osteoarthritis. However, evolving medical guidelines and clinical practices are expanding the criteria for surgical intervention to include moderate cases of OA. This shift increases the

patient population eligible for joint replacement, further driving market growth. As awareness of the benefits of early intervention spreads, younger patients suffering from degenerative joint conditions may also consider artificial joints as a viable option, expanding the overall market demographic. Government policies and healthcare insurance coverage are increasingly supporting orthopedic surgeries, recognizing the importance of treating osteoarthritis to improve population health. Enhanced insurance reimbursement for joint replacement surgeries can stimulate demand, making it more feasible for patients to undergo these procedures. Many healthcare systems are focusing on preventive care and efficient treatment pathways for musculoskeletal disorders, encouraging the adoption of surgical solutions to improve long-term health outcomes.

Rising Aging Population

The rising aging population is a pivotal driver of growth in the global artificial hip and knee joints market. This demographic trend is reshaping healthcare demands and significantly influencing orthopedic practices. Advances in healthcare, nutrition, and living standards have led to increased life expectancy. As people live longer, they are more likely to experience age-related conditions, including degenerative joint diseases such as osteoarthritis. The baby boomer generation, born between 1946 and 1964, is now reaching retirement age. This demographic cohort is significant in size, and as they age, the prevalence of age-related health issues, including joint disorders, is expected to rise sharply.

As individuals age, the natural degeneration of cartilage and joints occurs, leading to conditions such as osteoarthritis. This degeneration is often exacerbated by previous injuries, lifestyle choices, and genetic predisposition. Older adults may lead more sedentary lifestyles due to health concerns, leading to obesity. Excess weight puts additional stress on weight-bearing joints, further accelerating joint degeneration and increasing the need for surgical interventions.

Joint replacements are a well-established solution for alleviating pain and restoring mobility in older adults. As more elderly individuals seek to maintain an active lifestyle and independence, the demand for these surgical procedures grows. The high success rates of joint replacement surgeries lead to improved patient outcomes and satisfaction. Positive patient experiences contribute to a growing awareness of the benefits of surgical interventions, encouraging more individuals to consider joint replacement. As the need for joint replacement surgeries increases, healthcare providers are investing in specialized orthopedic centers, training programs, and advanced surgical technologies

to meet patient needs effectively. Hospitals and surgical centers are expanding their capacities to accommodate the anticipated influx of patients requiring joint replacement surgeries. This includes increasing operating room availability and enhancing rehabilitation services.

Advancements in minimally invasive surgical procedures allow for shorter recovery times, reduced hospital stays, and less postoperative pain, making these surgeries more attractive to older patients. Innovations in implant design and materials, such as the use of high-performance polymers and ceramics, are improving the longevity and functionality of artificial joints, further encouraging patients to consider surgical options. Many healthcare systems are enhancing reimbursement policies for joint replacement surgeries, making it more financially feasible for older adults to undergo these procedures. Policymakers are emphasizing preventive care and early intervention, encouraging older adults to seek timely surgical solutions rather than delaying treatment and experiencing further complications. Increased access to information through the internet and healthcare resources allows older adults to understand the benefits of joint replacement surgery, leading to greater willingness to pursue these options. The growth of patient advocacy groups and support networks fosters a sense of community among older adults, providing encouragement and resources for those considering joint replacement surgery.

Growing Awareness and Acceptance of Joint Replacement Surgery

Growing awareness and acceptance of joint replacement surgery significantly contribute to the expansion of the global artificial hip and knee joints market. As more patients become informed about the benefits and advancements in these procedures, they are increasingly willing to consider surgical interventions to alleviate joint pain and improve their quality of life. The internet has become a crucial source of information for patients seeking knowledge about their health. Websites, social media platforms, and online forums provide valuable insights into joint disorders, treatment options, and patient experiences. Educational content, including videos, articles, and webinars, demystifies the surgical process and encourages patients to consider joint replacements. Healthcare providers are increasingly implementing patient education programs that inform individuals about the causes, symptoms, and treatments of joint disorders. These initiatives foster a better understanding of the benefits of joint replacement surgery, dispelling myths and misconceptions that may have previously deterred patients from pursuing surgery.

Joint replacement surgeries, particularly hip and knee replacements, have

demonstrated high success rates in alleviating pain and restoring mobility. Patients are more likely to consider surgery when they learn about the positive outcomes and improved quality of life reported by others. The development of minimally invasive surgical techniques has made joint replacements safer and more appealing to patients. Shorter recovery times reduced postoperative pain, and minimal scarring have made these procedures increasingly attractive, encouraging more individuals to opt for surgery. Satisfied patients who share their successful joint replacement experiences can serve as powerful advocates. Their testimonials often resonate with individuals facing similar health challenges, creating a ripple effect that encourages others to consider surgical options. The emergence of patient support groups and online communities fosters discussion around joint replacement surgery, providing a platform for individuals to share their journeys, challenges, and successes. These groups promote a sense of community, which can motivate others to explore surgical interventions.

As joint replacement surgeries become more common and widely accepted, the stigma surrounding surgical interventions diminishes. Many patients now view surgery as a legitimate and effective means of addressing debilitating joint pain, rather than a last resort. Healthcare providers play a crucial role in shaping patient attitudes. When physicians emphasize the benefits of joint replacement surgery and actively discuss it as a treatment option, patients are more likely to accept and pursue surgical solutions. Older adults and individuals with joint issues are increasingly prioritizing their ability to maintain active and independent lifestyles. As awareness of joint replacement surgery grows, more patients are inclined to consider it to regain mobility and participate in activities they enjoy. Chronic pain and reduced mobility can lead to mental health challenges, such as depression and anxiety. Recognizing the link between physical and mental well-being, patients are motivated to seek surgical solutions that can enhance both their physical and emotional quality of life. Many insurance providers are expanding coverage for joint replacement surgeries, making these procedures more accessible to patients. Enhanced reimbursement policies reduce the financial burden on patients, encouraging them to consider surgical options. Public health initiatives aimed at educating populations about joint health and available treatments can further promote acceptance and awareness of joint replacement surgery.

Key Market Challenges

High Costs and Economic Burden

One of the most significant barriers to growth in the artificial hip and knee joints market

is the high cost associated with joint replacement surgeries and implants. The costs of artificial joints, surgical procedures, and associated healthcare services can be prohibitively high for many patients. Even in regions with comprehensive insurance coverage, high out-of-pocket expenses may deter patients from pursuing surgery. This financial burden can limit access to care, especially in economically disadvantaged populations.

The economic burden does not end with the initial surgery; long-term follow-up care, rehabilitation, and potential complications can incur additional costs. Patients who may require revision surgeries or ongoing physical therapy face further financial strain, which can discourage them from opting for joint replacements in the first place. Healthcare systems, particularly in countries with constrained budgets, may prioritize less expensive treatments over joint replacements. This can lead to delayed surgeries and a focus on conservative management of joint disorders, limiting the overall market potential for artificial joints.

Regulatory and Approval Challenges

Navigating the regulatory landscape can present significant hurdles for companies operating in the artificial hip and knee joints market. Manufacturers of orthopedic implants must adhere to rigorous regulatory standards established by health authorities such as the U.S. Food and Drug Administration (FDA) and the European Medicines Agency (EMA). The approval process for new implants and surgical techniques can be lengthy and costly, delaying the introduction of innovative products to the market.

After approval, devices are subject to ongoing post-market surveillance to monitor their safety and efficacy. This scrutiny can result in increased costs and operational challenges for manufacturers, particularly if any issues arise that require recalls or modifications to existing products. Differences in regulatory requirements across regions can complicate global market entry strategies for manufacturers. Companies may face difficulties in navigating diverse regulatory environments, which can hinder their ability to launch products simultaneously in different markets.

Key Market Trends

Technological Innovations and Advancements

Technological advancements are at the forefront of transforming the artificial hip and knee joints market. These innovations enhance surgical precision, improve patient

outcomes, and contribute to the overall appeal of joint replacement surgeries. Robotics and Computer- The adoption of robotic-assisted surgery and computer navigation systems is revolutionizing orthopedic procedures. These technologies allow for greater precision during surgery, minimizing the invasiveness of procedures and improving implant alignment. As surgeons become more adept at using these tools, patient outcomes are expected to improve significantly, driving greater acceptance of joint replacement surgery.

The introduction of 3D printing technology enables the production of patient-specific implants tailored to individual anatomical needs. Customization leads to better fit and functionality, potentially increasing the longevity of the implants and reducing the risk of complications. This trend not only enhances the patient experience but also positions manufacturers that invest in these technologies as leaders in innovation. Ongoing research and development are leading to the creation of new biomaterials that offer improved durability, biocompatibility, and reduced wear. Innovations in implant design, such as modular components and resurfacing techniques, allow for easier revisions and longer-lasting solutions. As these advancements continue to emerge, they will further drive market growth by attracting patients and healthcare providers seeking the best available options.

Shift Towards Value-Based Healthcare Models

The transition from volume-based to value-based healthcare models is reshaping the landscape of the artificial hip and knee joints market. This shift emphasizes the importance of patient outcomes and cost-effectiveness in healthcare delivery. **Emphasis on Quality of Care:** Healthcare providers are increasingly focusing on delivering high-quality care that improves patient outcomes. As a result, orthopedic practices are adopting measures that track patient satisfaction and post-surgical recovery. This emphasis on quality drives the adoption of innovative technologies and surgical techniques that enhance the success of joint replacement surgeries, ultimately contributing to market growth.

With rising healthcare costs, payers and healthcare systems are demanding evidence of the cost-effectiveness of joint replacement procedures. Manufacturers that demonstrate the long-term value of their products through clinical studies and real-world evidence will be better positioned in the market. This trend encourages innovation in implant design and materials that enhance durability and reduce the need for revisions, leading to greater patient satisfaction and lower overall costs. **Integrated Care Pathways:** The emergence of integrated care pathways in orthopedic treatment is driving collaboration

among healthcare providers, hospitals, and rehabilitation centers. This holistic approach ensures that patients receive comprehensive care before, during, and after surgery, ultimately leading to better outcomes. As integrated care models gain traction, the artificial hip and knee joints market will benefit from increased patient referrals and enhanced support for postoperative recovery.

Segmental Insights

Site Insights

Based on the category of Site, the Knee disorder segment emerged as the dominant in the global market for artificial hip and knee joints in 2023. As individuals age, the cartilage in the knee joint gradually wears down, leading to osteoarthritis, which is a significant contributor to knee pain and functional impairment. Given the aging global population, the incidence of knee-related disorders is expected to rise sharply, thereby increasing the demand for knee joint replacements. Rising obesity rates and sedentary lifestyles exacerbate knee joint issues. Excess weight places additional stress on the knee joints, accelerating the degeneration process and increasing the likelihood of requiring surgical intervention. As these trends continue, more patients will seek knee replacements as a viable solution. Clinical studies demonstrate that knee replacement surgeries, including total and partial knee replacements, achieve high success rates in terms of pain relief and functional improvement. This has bolstered patient confidence in the procedure, encouraging more individuals to consider surgery when facing knee problems. Many patients report significant enhancements in their quality-of-life following knee replacement surgery. The ability to return to normal activities and engage in physical exercise is a strong motivator for patients to seek out these procedures. As awareness of these benefits grows, the demand for knee joint replacements is expected to increase.

The adoption of minimally invasive surgical approaches has led to reduced recovery times, lower complication rates, and less postoperative pain for patients. These improvements enhance the overall patient experience, making knee replacement surgeries more attractive and driving market growth. Continuous innovation in knee implant designs, such as the development of customized and patient-specific implants, has improved the fit and function of artificial knees. Enhanced materials and designs also contribute to the longevity of implants, making them a more appealing option for patients and healthcare providers alike. Enhanced patient education through healthcare providers and advocacy groups has led to greater awareness of knee disorders and available treatment options. This education empowers patients to seek surgical

solutions earlier in their treatment journey, thereby increasing the demand for knee replacements. Personal success stories from patients who have undergone knee replacement surgery play a crucial role in influencing others facing similar conditions. As more individuals share their positive experiences, the stigma around surgical intervention diminishes, leading to higher acceptance rates for knee joint replacements. These factors collectively contribute to the growth of this segment.

Regional Insights

North America emerged as the dominant in the global Artificial Hip and Knee Joints market in 2023, holding the largest market share in terms of value. North America has a significant aging population, with a growing number of individuals aged 65 and older. This demographic is more susceptible to joint-related disorders, leading to an increased demand for hip and knee replacements. Lifestyle-related issues such as obesity, sedentary behavior, and poor diet contribute to the development of joint disorders. The high prevalence of obesity in North America exacerbates the incidence of osteoarthritis, driving more patients to seek surgical interventions for relief. The region is home to advanced healthcare facilities, specialized orthopedic clinics, and well-trained healthcare professionals. Access to high-quality medical care ensures that patients receive timely diagnosis and treatment, including joint replacement surgeries. North American countries, particularly the United States, are at the forefront of medical research and innovation. Significant investments in research and development lead to advancements in surgical techniques, implant technologies, and treatment protocols, enhancing the overall efficacy of joint replacement procedures.

The adoption of robotic-assisted surgical systems has gained momentum in North America. These technologies enhance surgical precision, improve patient outcomes, and reduce recovery times, making joint replacement surgeries more appealing to patients. Innovations in 3D printing technology enable the production of patient-specific implants tailored to individual anatomical needs. Customization leads to improved implant fit and functionality, increasing patient satisfaction and reducing the risk of complications. Many insurance providers in North America offer extensive coverage for hip and knee replacement surgeries. This accessibility ensures that patients can afford the procedures, leading to higher surgery rates and increased demand for artificial joints. The shift towards value-based healthcare in North America incentivizes healthcare providers to focus on improving patient outcomes and satisfaction. As joint replacement surgeries demonstrate positive long-term results, they are increasingly supported by reimbursement policies, further driving market growth.

Key Market Players

Exactech, Inc

CORENTEC Co., Ltd.

Smith+Nephew

Zimmer Biomet

Enovis Corporation

Medical Device Business Services, Inc

Medacta International SA

MicroPort Orthopedics, Inc

Stryker

CONMED Corporation

Report Scope:

In this report, the Global Artificial Hip and Knee Joints Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Artificial Hip and Knee Joints Market, By Site:

Hip Joints

Knee Joints

Artificial Hip and Knee Joints Market, By End User:

Hospitals & Surgery Centers

Orthopedic Clinics

Others

Artificial Hip and Knee Joints Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Artificial Hip and Knee Joints Market.

Available Customizations:

Global Artificial Hip and Knee Joints market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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