

# **Bone Morphogenetic Protein Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Recombinant Human Bone Morphogenetic Protein (rhBMP) – 2, Recombinant Human Bone Morphogenetic Protein (rhBMP) -7), By Application (Spinal Fusion, Trauma, Reconstructive Surgery, Oral-maxillofacial), By Region, and By Competition**

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## **Abstracts**

Global Bone Morphogenetic Protein Market has valued at USD 710.43 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 3.22% through 2028. The Global Bone Morphogenetic Protein Market refers to the market for a group of growth factors that play a crucial role in bone formation and repair. These proteins stimulate the production of new bone tissue and are used in various medical applications, particularly in orthopedic and dental procedures.

### **Key Market Drivers**

#### **Aging Population and Increasing Orthopedic Conditions**

The global healthcare landscape is undergoing a significant transformation due to the aging population and the increasing prevalence of orthopedic conditions. One of the key beneficiaries of this demographic shift is the Global Bone Morphogenetic Protein (BMP) Market. BMPs, a group of growth factors with remarkable bone-regenerating properties, have become indispensable in orthopedic and spinal surgeries, driven by the growing demand for innovative solutions to address the healthcare needs of older adults.

The aging population is a global phenomenon. According to the World Health Organization (WHO), the world's population over 60 years old is expected to nearly double by 2050, reaching around 2.1 billion. This demographic shift is primarily attributed to increased life expectancy and decreased birth rates, resulting in a higher proportion of elderly individuals.

As people age, the risk of orthopedic conditions and related disorders significantly increases. These conditions include osteoarthritis, osteoporosis, fractures, and degenerative disc diseases. The bones and joints naturally undergo wear and tear, making elderly individuals more susceptible to musculoskeletal problems.

BMPs are commonly used in spinal fusion surgeries, a procedure that stabilizes the spine by fusing two or more vertebrae together. As the aging population is more prone to spinal issues such as herniated discs and spinal stenosis, the demand for spinal fusion procedures utilizing BMPs is expected to surge. Aging individuals often experience more fractures due to weakened bones. BMPs can be employed to expedite the healing of fractures, allowing patients to regain mobility and independence more quickly. Hip and knee replacements are common among the elderly. BMPs enhance the integration of these implants with the patient's natural bone, ensuring longevity and improved post-surgical mobility.

The rising number of elderly patients with orthopedic conditions directly translates into a larger pool of potential BMP recipients. This expanded patient base is driving market growth. As the elderly population continues to grow, the demand for orthopedic surgeries and spinal procedures is expected to increase. BMPs are a critical component of these surgical interventions, further boosting market growth. The benefits of BMPs are not limited to orthopedics alone. These growth factors are increasingly being used in other areas, such as dental and craniofacial surgeries, further diversifying the BMP market. The aging population's unique healthcare needs have prompted increased research and development efforts in the BMP sector. These endeavors aim to improve the efficacy, safety, and versatility of BMP products.

### Minimally Invasive Surgery

The realm of healthcare and surgery is witnessing a paradigm shift, with minimally invasive procedures emerging as a game-changer. These innovative surgical techniques not only benefit patients through reduced pain and faster recovery but also have a profound impact on the medical industry.

Patients undergoing minimally invasive procedures typically experience reduced pain and discomfort, leading to quicker post-operative recovery. Many MIS patients can be discharged sooner, which not only lowers healthcare costs but also frees up hospital resources for more patients. Smaller incisions result in minimal scarring, improving cosmetic outcomes and boosting patient satisfaction. Smaller incisions reduce the risk of post-operative infections, enhancing patient safety. Minimally invasive techniques often lead to reduced blood loss during surgery. Advanced imaging and robotic-assisted technologies used in MIS provide surgeons with enhanced precision and control.

In minimally invasive orthopedic surgeries, where smaller incisions are made, BMPs are utilized to promote bone healing and fusion. These growth factors significantly reduce the healing time, allowing patients to regain mobility and function more quickly. In traditional open surgeries, grafts are often required to support bone fusion. However, BMPs can minimize the need for these grafts, further reducing patient discomfort and surgical complications in minimally invasive procedures. BMPs have been shown to enhance fusion rates in spinal surgeries, particularly in minimally invasive spinal fusion procedures. Improved fusion outcomes contribute to long-term patient satisfaction and reduced healthcare costs. The minimally invasive approach, with the assistance of BMPs, allows surgeons to address a wider range of orthopedic and spinal conditions, from degenerative disc diseases to spinal instability. This expanded applicability is driving the adoption of BMPs in minimally invasive surgery.

The increasing acceptance of minimally invasive procedures by both patients and healthcare providers is resulting in a higher volume of surgeries. As BMPs are integral to many of these procedures, the BMP market is poised for substantial growth. Patients increasingly seek minimally invasive options due to the reduced pain and faster recovery they offer. As patient awareness and demand grow, healthcare facilities are likely to incorporate BMPs into their offerings to remain competitive. Ongoing advancements in surgical technologies, including those used in minimally invasive surgery, are expected to further enhance the efficiency and effectiveness of BMPs in bone healing. As BMPs continue to prove their worth in minimally invasive orthopedic and spinal surgeries, their application is diversifying into other fields, such as oral and maxillofacial surgery, further expanding the market's reach.

### Advancements in Orthopedics

The field of orthopedics, dedicated to the diagnosis and treatment of musculoskeletal disorders, has been evolving rapidly over the years. One of the key drivers of this

transformation is the continuous stream of advancements in orthopedic technologies and techniques. As these innovations unfold, they are not only improving patient outcomes but also significantly contributing to the growth of the Global Bone Morphogenetic Protein (BMP) Market.

The development of new materials, such as bioactive ceramics and advanced metals, has led to orthopedic implants that are more durable, biocompatible, and closer in properties to natural bone. These materials are often enhanced with BMPs to improve integration with the patient's bone. In addition, minimally invasive procedures are on the rise. Advanced imaging, robotic-assisted surgery, and specialized instruments are making it possible to perform complex orthopedic surgeries through smaller incisions. This trend is particularly relevant to the BMP market as it enhances the appeal of BMPs in minimally invasive surgeries. 3D printing and computer-assisted design and manufacturing have made it possible to create patient-specific orthopedic implants. These custom-made implants improve fit and function, and the use of BMPs can enhance the integration of these implants. Orthobiologics, including BMPs, are being integrated into orthopedic treatments to stimulate natural healing and regeneration. This is particularly relevant in cases of cartilage repair, osteoarthritis management, and non-union bone fractures. The use of data analytics and artificial intelligence is improving patient assessment, treatment planning, and post-operative care in orthopedics. This enhances the precision and effectiveness of orthopedic procedures, including those involving BMPs.

As orthopedic implant materials become more advanced, BMPs are utilized to improve the integration of these materials with the patient's bone. This not only enhances implant durability but also reduces the chances of complications. In spinal fusion surgeries, where orthopedic advancements are frequent, BMPs have been instrumental in improving fusion rates. This is crucial in the treatment of spinal conditions, which are common among aging individuals. The focus on biological enhancements in orthopedics aligns well with BMPs, which are known for their regenerative properties. In cases of cartilage repair and osteoarthritis, BMPs can stimulate the body's natural healing processes.

As orthopedic advancements become standard practice, the use of BMPs is expected to grow, particularly in spinal and orthopedic surgeries where their regenerative potential is most critical. Patients benefit from improved orthopedic procedures that incorporate BMPs, experiencing less pain, faster recovery, and better long-term outcomes. This patient satisfaction fosters the growth of the BMP market. The continuous evolution of orthopedic technologies and techniques creates opportunities

for further research and development in BMP products, ensuring they remain at the forefront of innovation. The diversification of orthopedic advancements into new subspecialties, such as sports medicine and joint preservation, opens doors for BMPs to be applied in a wider range of conditions, expanding the BMP market's reach.

### Strong Market Players

The Global Bone Morphogenetic Protein (BMP) Market is undergoing a phase of rapid expansion, and one of the key drivers behind this growth is the active participation and innovation of strong market players. Companies in the healthcare and biotechnology sectors are continually pushing the boundaries of research and development, which not only enhances the BMP market but also brings about significant advancements in orthopedic and regenerative medicine.

Strong market players allocate substantial resources to research and development, leading to the innovation of new BMP products, delivery methods, and applications. This commitment to advancing BMP technology keeps the market at the forefront of scientific progress. These companies often initiate and sponsor clinical trials to evaluate the safety and efficacy of BMP products in a variety of medical applications. This research provides valuable data that supports the expanded use of BMPs, enhancing the credibility of the BMP market. Experienced market players are well-versed in navigating complex regulatory landscapes. Their expertise in gaining regulatory approvals for BMP products not only ensures product safety but also opens doors for market expansion. Leading companies have established extensive distribution networks that enable them to reach healthcare providers and facilities worldwide. This broad reach facilitates the adoption of BMP products in various regions, contributing to the global market's growth. These market players often engage in strategic collaborations and acquisitions to expand their BMP product portfolios. This enables them to offer a wider range of BMP solutions, catering to diverse medical needs. Leading companies are active in educating healthcare professionals about the benefits and applications of BMPs. Their educational initiatives help increase awareness and drive the adoption of BMPs in clinical practice.

The ongoing innovation and competition among market players lead to the development of more advanced BMP products. This stimulates demand for BMPs as healthcare providers seek the most effective and cutting-edge solutions for their patients. The active participation of these market leaders ensures that BMPs are applied in a broader range of medical disciplines. As BMPs find new applications in fields like dentistry, oral and maxillofacial surgery, and craniofacial reconstruction, the BMP market expands accordingly. Strong market players are committed to maintaining high-quality standards

for BMP products. Their stringent quality control processes build trust in the reliability and safety of BMPs, encouraging their adoption by healthcare professionals. The global distribution networks of these companies enable BMP products to reach a wide range of healthcare facilities and providers, both in developed and emerging markets. This accessibility fosters the BMP market's growth on a global scale.

## Key Market Challenges

### Safety Concerns

One of the primary challenges confronting the BMP market is the safety concerns associated with these growth factors. Some studies have raised questions about potential side effects and complications, such as excessive bone growth, inflammation, or complications associated with BMP products. As a result, healthcare providers and regulatory agencies are taking a closer look at the safety profile of BMPs, necessitating rigorous clinical evaluation and ongoing monitoring to ensure patient safety.

### Alternative Bone Graft Materials

The availability of alternative bone graft materials, such as synthetic grafts and allografts, poses a challenge to the BMP market. Surgeons and healthcare providers may opt for these alternatives due to concerns about BMP safety or cost considerations. The BMP market must continuously demonstrate the unique advantages of BMPs over other options.

### Long-Term Efficacy

Ensuring the long-term efficacy and safety of BMPs remains a challenge. Some studies suggest that the bone formed with BMPs may be less dense and less mechanically stable than natural bone. Long-term follow-up studies are needed to address these concerns and provide evidence of BMPs' lasting benefits.

## Key Market Trends

### Regenerative Medicine Integration

The integration of BMPs into the field of regenerative medicine is a prominent trend. BMPs have been utilized for bone regeneration, but their applications are expanding into soft tissue and cartilage repair. This trend will foster collaborations between



orthopedic and regenerative medicine specialists, opening new avenues for BMP research and applications.

### Advanced Delivery Systems

Advancements in delivery systems for BMPs are on the horizon. These systems will enable precise and controlled release of BMPs at the site of treatment. Enhanced delivery methods will improve the safety and effectiveness of BMPs, reducing potential side effects and complications.

### 3D Printing and Implant Customization

The use of 3D printing in orthopedics is revolutionizing implant design. Customized, patient-specific implants are becoming more common, and BMPs are playing a vital role in ensuring these implants integrate seamlessly with the patient's natural bone. This trend enhances implant longevity and overall patient satisfaction.

### Segmental Insights

#### Application Insights

Based on the category of Application, it is anticipated that spinal fusion will capture a significant portion of the market. Spinal fusion involves the utilization of bone morphogenetic protein (BMP), a protein known for its capacity to stimulate bone formation in the human body. BMP finds extensive use in spinal fusion procedures. Research indicates that BMP is widely embraced due to its ability to promote fusion at a rate surpassing that of conventional bone graft surgery. This attribute provides surgeons with the advantage of enhanced fusion rates, obviating the complexities associated with harvesting iliac crest autografts (hip grafts). Avoiding the use of hip grafts reduces surgical duration and lowers complication rates, resulting in swifter and less painful recovery periods. The upswing in spinal surgeries, coupled with the facilitative role of BMP, is driving the rapid expansion of its application in spinal fusion procedures.

Additionally, a study published in the National Library of Medicine in May 2022 reveals that annually, between 250,000 and 500,000 individuals worldwide suffer from spinal cord injuries, with the majority stemming from preventable causes like violence and car accidents. In the United States, around 17,000 new cases of spinal cord injuries are reported each year, and an estimated 282,000 people live with such injuries. Notably, men predominate among patients with sports-related spinal cord injuries, with the age

group of 16 to 30 years being at the highest risk for such injuries. Consequently, the high incidence of spinal cord injuries is driving demand for spinal fusion devices in the forthcoming years. Furthermore, the growing preference for minimally invasive surgical techniques, owing to their numerous advantages, is fueling the overall market expansion.

### Type Insights

The rhBMP-2, or recombinant human Bone Morphogenetic Protein-2, is poised to experience substantial market dominance during the forecast period in the Global Bone Morphogenetic Protein Market for several compelling reasons. First and foremost, rhBMP-2 has demonstrated remarkable efficacy in stimulating bone formation, making it an indispensable component of spinal fusion surgeries, where it facilitates fusion rates superior to traditional bone graft procedures. Its ability to expedite the healing process and reduce complications associated with autograft harvesting, particularly from the iliac crest, contributes to its growing popularity. Additionally, rhBMP-2 addresses a pressing global healthcare issue, as an increasing number of individuals suffer from spinal cord injuries each year. As the demand for spinal fusion devices surges, driven by both injury cases and a preference for minimally invasive techniques, rhBMP-2 is well-positioned to capture a significant market share, reflecting its pivotal role in enhancing patient outcomes and improving surgical procedures in this evolving market landscape.

### Regional Insights

In the Bone Morphogenetic Protein Market, North America is poised to claim a substantial market share throughout the forecast period. This region has been experiencing significant growth and is expected to maintain its dominant position in the market, primarily due to its well-established healthcare system and the widespread adoption of cutting-edge technologies. An article published in the National Library of Medicine in August 2020 highlights the approval of the protein molecule known as rhBMP-2 by the United States Food and Drug Administration, which has emerged as a preferred choice for bone-related surgeries in the United States. In line with this, the American Association of Neurological Surgeons reported in 2021 that approximately 450,000 individuals in the United States were living with spinal cord injuries, underscoring the high demand for effective solutions in this region. Furthermore, with back pain affecting 80% of Americans at some point in their lives, as indicated in a January 2022 article titled '40 Back Pain Statistics,' there exists significant potential for the utilization of bone morphogenetic proteins in the country. Notably, traumatic incidents, falls, accidents, and road traffic collisions contribute to spinal injuries, with



data from the 'Ministry of Communications and Transportation (Mexico)' updated in September 2020 revealing that 8,500 individuals were injured in road traffic accidents in the region.

### Key Market Players

Johnson & Johnson

Ember Therapeutics Inc

Integra LifeSciences Holdings Corp

Medtronic PLC

Bio-Techne Corp

Merck KGaA

Pfizer Inc

Stryker Corp

Thermo Fisher Scientific Inc

Zimmer Biomet Holdings Inc

### Report Scope:

In this report, the Global Bone Morphogenetic Protein Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Bone Morphogenetic Protein Market, By Type:

Recombinant Human Bone Morphogenetic Protein (rhBMP) – 2

Recombinant Human Bone Morphogenetic Protein (rhBMP) -7

#### Bone Morphogenetic Protein Market, By Application:

Spinal Fusion

Trauma

Reconstructive Surgery

Oral-maxillofacial

Bone Morphogenetic Protein Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia-Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Bone Morphogenetic Protein Market.

## Available Customizations:

Global Bone Morphogenetic Protein market report with the given market data, Tech Sci 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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