

# **Bone Void Fillers Market - Global Industry Size, Share, Trends, Competition, Opportunity, and Forecast, Segmented By Material (Calcium Sulphate, Demineralized Bone Matrix, Tri-Calcium Phosphate, Others), By Form (Putty, Paste, Granules, Gel, Others), By Procedure (Spine Fusion & Interbody Fusion, Oral Surgeries, Others), By End User (Hospitals, Specialty Clinics, Others), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Bone Void Fillers Market is projected to expand significantly, rising from USD 3.99 Billion in 2025 to USD 5.93 Billion by 2031, demonstrating a compound annual growth rate of 6.83%. These sterile biological or synthetic materials are crucial for filling skeletal defects, aiding bone repair, and ensuring structural stability during recovery. The fundamental drivers of this growth include the increasing occurrence of orthopedic trauma and degenerative bone diseases, which frequently necessitate reconstructive surgeries. Additionally, the globally expanding geriatric population plays a vital role by directly increasing the number of patients requiring surgical interventions for osseous voids.

While the International Osteoporosis Foundation reported that up to 37 million fragility fractures occur annually worldwide in individuals over 55 in 2024, highlighting a pressing demand for effective bone repair solutions, the market also faces a considerable hurdle. This challenge stems from the high cost associated with advanced graft substitutes, which, combined with often limited reimbursement coverage in developing healthcare systems, can restrict patient access and hinder the broader commercial adoption of premium void filling technologies.

## Market Driver

A primary catalyst propelling the bone void fillers market is the escalating volume of spinal fusion and joint reconstruction surgeries. As the prevalence of degenerative conditions mandates more frequent surgical interventions, the demand for efficient void filling materials to eliminate dead space and support implant stability has experienced a significant surge. This trend is quantitatively affirmed by major industry performance metrics, indicating heightened procedural activity. For instance, Stryker Corporation's 'Operating Results for the Third Quarter of 2025' in October 2025 revealed an 11.7 percent increase in unit volume within its Orthopaedics segment, directly illustrating the rising demand for reconstructive solutions. The extensive scale of procedural data further underscores this growth, with the American Academy of Orthopaedic Surgeons' 'American Joint Replacement Registry 2025 Annual Report' from October 2025 analyzing over 4.4 million cumulative hip and knee arthroplasty procedures, thereby highlighting the immense addressable market for bone repair consumables.

Simultaneously, technological breakthroughs in synthetic and bioactive bone grafts are revolutionizing clinical preferences by providing superior alternatives to autologous bone. Surgeons are increasingly opting for these advanced substitutes due to their inexhaustible supply, capacity to reduce donor site morbidity, and enhanced osteoconductive properties that accelerate fusion. This pronounced shift towards sophisticated synthetic matrices is fueling rapid commercial adoption across the sector. Kuros Biosciences' 'First Half of 2025 Results' report in August 2025, for example, noted a 77 percent year-over-year rise in direct sales of its MagnetOs bone graft, underscoring the robust market integration of next-generation bioactive technologies. As these innovative materials prove effective in complex spinal and trauma applications, they are consistently capturing market share from conventional grafting methods.

## Market Challenge

The significant impediment to the growth of the Global Bone Void Fillers Market arises from the high cost of advanced graft substitutes, exacerbated by restrictive reimbursement frameworks. While cutting-edge synthetic scaffolds and biologic materials offer distinct clinical advantages, their elevated price points establish substantial economic barriers for healthcare providers. In an environment increasingly focused on cost containment, hospitals and surgical centers frequently encounter budget constraints that limit their ability to adopt these sophisticated products. This financial pressure often compels procurement committees to prioritize more economical

alternatives, such as standard ceramics or traditional autografts, consequently hindering the revenue potential and market penetration of higher-value void filling technologies.

This economic strain is further compounded by a reduction in payment rates for orthopedic services. For example, the American Academy of Orthopaedic Surgeons reported in 2025 that the Medicare Physician Fee Schedule conversion factor decreased by 2.83% compared to the prior year. This contraction in reimbursement directly impacts the operational margins of orthopedic practices, diminishing the financial flexibility necessary to utilize expensive bone repair solutions. As a result, the disparity between the clinical requirement for effective bone void fillers and the financial capacity to procure them continues to expand, impeding broader commercial expansion.

## **Market Trends**

A defining trend emerging in the bone void fillers market is the growing adoption of antibiotic-eluting formulations, driven by healthcare providers' emphasis on infection management during complex orthopedic procedures. Unlike conventional grafts that solely offer structural support, these advanced products deliver high local concentrations of antimicrobials directly to the surgical site, effectively reducing the risk of osteomyelitis in trauma and revision cases. This unique dual capability—to both fill osseous defects and actively prevent bacterial colonization—has spurred rapid market uptake, particularly within healthcare systems committed to lowering long-term hospital costs associated with readmissions. Bonesupport Holding AB's 'Interim Report Q3 2025' from October 2025 highlighted a 40 percent increase in U.S. sales of its antibiotic-eluting product CERAMENT G in constant currency year-over-year, signifying a clear and accelerating clinical preference for prophylactic bioactive solutions.

Concurrently, the integration of 3D printing for customized implants is fundamentally transforming the manufacturing landscape by enabling the creation of patient-specific reconstruction solutions. Additive manufacturing facilitates the production of highly porous, trabecular structures that precisely conform to a patient's unique anatomical defects, thus offering superior biological fixation compared to standard off-the-shelf alternatives. This move towards personalization not only reduces operative time spent shaping grafts but also enhances the mechanical interface between the implant and host bone. The commercial viability of this technology is attracting significant capital investments aimed at scaling production capabilities. Restor3d's press release from April 2025, concerning its growth capital financing, announced the company secured \$38 million to expedite the commercialization of four new patient-specific 3D printed

implant lines, underscoring the industry's strategic commitment to personalized musculoskeletal care.

### **Key Market Players**

Zimmer Biomet Holdings, Inc.

Stryker Corporation

DePuy Synthes, Inc.

Medtronic plc

Smith & Nephew plc

Orthofix Medical Inc.

Bioventus LLC

Baxter International Inc.

Collagen Matrix, Inc.

Graftys S.A.

### **Report Scope**

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

Bone Void Fillers Market, By Material

Calcium Sulphate

Demineralized Bone Matrix

Tri-Calcium Phosphate

Others

#### Bone Void Fillers Market, By Form

Putty

Paste

Granules

Gel

Others

#### Bone Void Fillers Market, By Procedure

Spine Fusion & Interbody Fusion

Oral Surgeries

Others

#### Bone Void Fillers Market, By End User

Hospitals

Specialty Clinics

Others

#### Bone Void Fillers 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 Bone Void Fillers Market.

## **Available Customizations:**

Global Bone Void Fillers 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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