

Shoulder Replacement Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Anatomical Shoulder Prosthesis, Reverse Shoulder Prosthesis), By Procedure (Resurfacing Hemiarthroplasty, Reverse Total Shoulder Replacement, Stemmed Hemiarthroplasty, Total Shoulder Replacement), By End-User (Hospitals, Orthopedic Centers, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F

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Abstracts

Global Shoulder Replacement Market has valued at USD 1.62 billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.21% through 2028. The global shoulder replacement market is a segment of the orthopedic medical device industry that focuses on the design, development, and distribution of shoulder implant systems and related surgical instruments. This market primarily caters to individuals suffering from shoulder joint disorders, such as osteoarthritis, rheumatoid arthritis, traumatic injuries, and rotator cuff tears, among others.

Key Market Drivers

Aging Population

The global healthcare landscape is undergoing a significant transformation, largely due to demographic shifts. One of the most prominent demographic changes is the aging population, which is set to reshape the healthcare industry, including the orthopedic sector. The aging population refers to a substantial increase in the number of elderly

individuals in society. This demographic shift is primarily attributed to declining birth rates and increased life expectancy. As more people live longer, they are more likely to encounter age-related musculoskeletal issues, which can result in shoulder joint problems. The aging population refers to a substantial increase in the number of elderly individuals in society. This demographic shift is primarily attributed to declining birth rates and increased life expectancy. As more people live longer, they are more likely to encounter age-related musculoskeletal issues, which can result in shoulder joint problems. Aging individuals tend to have higher healthcare expenditures due to the management of chronic conditions and age-related health concerns. As a result, governments and healthcare providers allocate more resources to cater to the needs of the elderly population. This increased investment in healthcare infrastructure and services includes orthopedic care, boosting access to shoulder replacement surgeries for older patients. Elderly individuals today are more proactive about maintaining their quality of life as they age. They are less willing to accept limitations in their mobility and functionality. Consequently, many older adults seek surgical interventions, like shoulder replacements, to regain their independence and enhance their overall well-being. The increasing demand for shoulder replacement surgeries driven by the aging population has led to greater investment in research and development within the orthopedic industry. Manufacturers are motivated to develop innovative shoulder implant technologies that cater to the unique needs of older patients. These advancements result in more durable, efficient, and patient-friendly implants, further boosting the appeal of shoulder replacement surgery among the elderly.

Rising Incidence of Shoulder Conditions

Shoulder conditions have become increasingly prevalent in recent years, affecting people of all ages. As individuals lead more active lifestyles and engage in various physical activities, the risk of shoulder injuries and degenerative conditions has risen. Participation in sports and physical activities has witnessed a significant upswing across the globe. While exercise is essential for maintaining a healthy lifestyle, it also comes with an increased risk of sports-related injuries, including those affecting the shoulder. These injuries can range from dislocations and fractures to overuse injuries like rotator cuff tears and tendinitis. Certain occupations involve repetitive or strenuous activities that can lead to shoulder injuries and conditions. Individuals working in physically demanding jobs, such as construction, manufacturing, or healthcare, are more prone to shoulder problems due to the constant strain and repetitive motions they endure. As the global population ages, the prevalence of degenerative shoulder conditions, such as osteoarthritis and rheumatoid arthritis, is on the rise. Aging is a natural process that can cause wear and tear on the joints, leading to pain and limited mobility in the shoulder

joint. Obesity is a growing health concern worldwide, and it has a significant impact on musculoskeletal health. Excess body weight places added stress on the shoulder joints, increasing the risk of developing conditions like osteoarthritis. As obesity rates continue to rise, the incidence of shoulder conditions is likely to follow suit.

Advancements in Implant Technology

In recent years, advancements in implant technology have revolutionized the field of orthopedics, particularly in the context of shoulder replacement surgeries. These innovations have not only improved the quality of life for patients suffering from shoulder joint disorders but have also significantly contributed to the growth of the global shoulder replacement market. Advancements in materials science have led to the development of new materials for shoulder implants. Traditional implants were often made of metal, but modern implants can be constructed from materials like highly durable polyethylene and ceramic. These materials offer enhanced longevity and reduced wear and tear, ensuring that the implants remain functional for a longer period. Modern shoulder implants are designed with a focus on replicating the natural range of motion and biomechanics of the shoulder joint. This improved design minimizes friction and wear, reducing the risk of implant failure or the need for revision surgeries. Patients can expect their shoulder replacements to last longer and function more naturally, thereby improving their overall quality of life. Advancements in implant technology have enabled greater customization and personalization of implants to fit the unique anatomical requirements of each patient. Computer-assisted design and manufacturing (CAD/CAM) techniques allow for the creation of patient-specific implants, ensuring a better fit and improved outcome. Personalized implants reduce the risk of complications and enhance patient satisfaction. The bearing surfaces of shoulder implants have seen significant improvements, with the introduction of highly wear-resistant materials. These surfaces are critical to the implant's longevity and functionality. Advancements in this area have resulted in reduced friction, decreased wear, and less debris generation, which can lead to better implant performance over time. Modern shoulder implants often feature biocompatible coatings that promote bone ingrowth and integration with the surrounding tissue. This technology facilitates the long-term stability and fixation of the implant, reducing the risk of loosening and the need for revision surgeries.

Patient Awareness and Education

In recent years, patient awareness and education have emerged as critical factors in shaping healthcare decisions. This trend is particularly evident in the field of orthopedics, where informed patients are driving the growth of the global shoulder

replacement market. Patient awareness begins with understanding shoulder conditions and their impact on daily life. Conditions such as osteoarthritis, rotator cuff tears, and shoulder fractures can severely limit mobility and cause chronic pain. As individuals become more educated about these conditions and their progression, they are more likely to seek medical attention and explore treatment options, including shoulder replacement surgery. Patient education helps individuals become aware of the various treatment options available for shoulder conditions. Beyond conservative therapies like physical therapy and medication, patients learn about the potential benefits of surgical interventions, including shoulder replacement. Knowing that surgery can provide long-term pain relief and improved function empowers patients to make informed decisions about their healthcare. Awareness of the advancements in shoulder replacement technology is crucial. Patients need to understand that modern implants are designed to offer better durability, a more natural range of motion, and quicker recovery times. This knowledge instills confidence in patients and encourages them to consider shoulder replacement surgery as a viable solution. Patient awareness and education contribute to a more favorable view of surgery. When patients understand the potential benefits and risks of shoulder replacement surgery, they are more likely to accept it as a recommended treatment option. As a result, the number of shoulder replacement procedures performed globally has been on the rise. Historically, there has been a stigma associated with joint replacement surgeries. However, as patients become better informed, this stigma is diminishing. Shoulder replacement is increasingly seen as a proactive step to improve one's quality of life rather than a last resort. This shift in perception is boosting market growth. Patient awareness and education empower individuals to actively participate in their healthcare decisions. Informed patients are more likely to engage in discussions with their healthcare providers, ask questions, and express their preferences. This collaborative approach to healthcare leads to more tailored treatment plans and a greater willingness to explore surgical options like shoulder replacement.

Key Market Challenges

Cost Constraints

One of the primary challenges in the shoulder replacement market is the cost associated with the procedure. Shoulder replacement surgery, like any major surgical intervention, involves expenses related to hospitalization, implants, anesthesia, surgeon fees, and post-operative care. These costs can be a significant burden for patients, especially in regions with limited healthcare coverage or high out-of-pocket expenses. As a result, affordability remains a major challenge, potentially limiting access to

shoulder replacement surgeries for some individuals.

Limited Insurance Coverage

In many healthcare systems, insurance coverage for shoulder replacement surgery may be inadequate or come with stringent criteria for eligibility. Patients often find themselves navigating complex insurance policies, facing denials or delays in coverage approval. The lack of comprehensive insurance can deter patients from pursuing necessary surgical interventions, further exacerbating their shoulder conditions.

Postoperative Rehabilitation

The success of shoulder replacement surgery often depends on postoperative rehabilitation. Patients need to undergo physical therapy and follow a tailored rehabilitation plan to achieve optimal outcomes. However, challenges arise when patients have limited access to rehabilitation services or struggle to adhere to their prescribed regimens. Poor rehabilitation can lead to suboptimal results and potentially necessitate revision surgeries.

Complications and Revision Surgeries

While shoulder replacement surgery has a high success rate, complications can occur, such as infection, implant loosening, and joint instability. These complications may require revision surgeries, which can be more complex and costly than the initial procedure. Addressing complications effectively is essential for patient satisfaction and long-term success but presents a challenge for healthcare providers and patients alike.

Key Market Trends

Rise of Personalized Implants

One of the most exciting trends in shoulder replacement surgery is the development of personalized implants. Advancements in 3D printing and computer-assisted design (CAD) allow for the creation of implants tailored to a patient's unique anatomy. These custom implants offer better fit, stability, and function, reducing the risk of complications and enhancing patient outcomes.

Robot-Assisted Surgery

Robot-assisted surgery is emerging as a game-changer in the field of orthopedics, including shoulder replacement. Robots offer unparalleled precision and accuracy, enabling surgeons to perform procedures with enhanced control. This technology not only improves implant placement but also reduces the risk of complications, potentially leading to better long-term outcomes.

Advanced Implant Materials

The development of new implant materials is an ongoing trend in the shoulder replacement market. Materials like highly durable polyethylene and ceramic are being used to create shoulder implants that last longer and withstand wear and tear better. Enhanced materials not only improve implant longevity but also reduce the need for revision surgeries.

Outpatient Shoulder Replacement

Traditionally, shoulder replacement surgeries required extended hospital stays. However, the trend toward outpatient shoulder replacement is gaining momentum. Improved surgical techniques, anesthesia, and pain management have made it possible for patients to undergo the procedure and return home on the same day. This trend enhances patient convenience and reduces healthcare costs.

Segmental Insights

Type Insights

Based on the category of Type, the Anatomical Shoulder Prosthesis is expected to show lucrative growth during the forecast period. Arthroplasty has established itself as a highly dependable treatment option for shoulder joint degenerative disorders. Over the past six decades, there have been numerous innovations in implant designs, aimed at resolving initial challenges encountered in arthroplasty, including the restoration of function and prevention of implant loosening. Despite the ascendancy of reverse shoulder arthroplasty (RSA) as the predominant shoulder replacement procedure in prominent nations like the United States and the United Kingdom, total anatomical shoulder arthroplasty (TSA) continues to serve as a well-established therapeutic approach for osteoarthritis in patients possessing a functional rotator cuff.

Individuals suffering from osteoarthritis who undergo TSA can now anticipate enduring and significant enhancements in pain relief and functionality. Given the proven

effectiveness of anatomical shoulder arthroplasty, it is projected to garner increased attention and demand in the future. In Europe, the International Osteoporosis Foundation (IOF) assumes responsibility for promoting awareness of osteoporosis care. According to the research article titled 'Trends in the Incidence and Prevalence of Osteoarthritis in the United Kingdom,' as published by the National Institute of Health, the incidence of osteoarthritis in the United Kingdom stood at 6.8 cases per 1000 individuals in 2020, with a prevalence rate of approximately 10.7% during the same year. These statistics are expected to contribute to the growth of the anatomical shoulder prosthesis segment.

End-User Insights

Hospitals are poised to dominate the global shoulder replacement market due to their integral role in providing comprehensive healthcare services, including orthopedic procedures. These institutions offer a wide range of specialized facilities, state-of-the-art surgical equipment, and a highly trained workforce, which are essential for conducting complex shoulder replacement surgeries. Additionally, hospitals often have established relationships with orthopedic surgeons and referral networks, making them the preferred choice for patients seeking shoulder replacement procedures. Their ability to provide pre-operative consultations, post-operative care, and rehabilitation services under one roof enhances patient convenience and fosters trust. Furthermore, hospitals frequently invest in the latest implant technologies and surgical techniques, ensuring that patients have access to cutting-edge treatments. As the demand for shoulder replacements continues to rise, hospitals are well-positioned to play a pivotal role in meeting this growing healthcare need.

Regional Insights

The North American region currently holds a commanding position in the shoulder replacement market, and this dominance is anticipated to persist in the forecasted period. This is attributed to the presence of prominent international medical device companies, rendering the United States and Canada as prominent hubs for the medical device industry. Furthermore, the continuous development of the healthcare infrastructure in both the United States and Canada is further propelling the market's growth.

According to data from the World Bank in 2020, approximately 16.9% of the American population was aged 65 or older, a figure projected to rise to 22% by 2050. Additionally, the United States is expected to witness a significant surge in the number of adults

diagnosed with arthritis, with a projected increase of 49% to reach 78.4 million individuals, constituting 25.9% of all adults. Moreover, youth sports participation in the United States is substantial, with nearly 30 million children and adolescents engaged in such activities each year, which is likely to drive demand for shoulder replacement devices.

Furthermore, in August 2021, Johnson & Johnson introduced the INHANCE Shoulder System, a fully integrated shoulder arthroplasty system that provides surgeons with the flexibility to seamlessly switch between stemless and stemmed implants during surgical procedures. These factors, among others, contribute to North America's current dominance in the market and indicate that this trend is expected to continue in the foreseeable future.

Key Market Players

Arthrex Inc

Zimmer Biomet Holdings Inc

Integra LifeSciences Corp

Johnson & Johnson

Smith & Nephew PLC

Wright Medical Group NV

Stryker Corp

DJO Global Inc

Acumed Inc

Exactech Inc

Report Scope:

In this report, the Global Shoulder Replacement Market has been segmented into the following categories, in addition to the industry trends which have also been detailed

below:

Shoulder Replacement Market, By Type:

Anatomical Shoulder Prosthesis

Reverse Shoulder Prosthesis

Shoulder Replacement Market, By Procedure:

Resurfacing Hemiarthroplasty

Reverse Total Shoulder Replacement

Stemmed Hemiarthroplasty

Total Shoulder Replacement

Shoulder Replacement Market, By End-User:

Hospitals

Orthopedic Centers

Others

Shoulder Replacement 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 Shoulder Replacement Market.

Available Customizations:

Global Shoulder Replacement 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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