

# **Total Wrist Replacement Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Technology (Total Wrist Replacement (TWR), Total Wrist Fusion (TWF)), By End-User (Hospitals & Clinics, Ambulatory care Centers, Others), By Region, By Competition Forecast & Opportunities, 2018-2028F**

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## **Abstracts**

Global Total Wrist Replacement Market has valued at USD 183.56 million in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.23% through 2028. The Global Total Wrist Replacement Market refers to the medical devices and procedures associated with replacing damaged or arthritic wrist joints with artificial implants. Wrist replacement surgery is typically performed on patients who have severe wrist pain and limited wrist function due to conditions like osteoarthritis, rheumatoid arthritis, post-traumatic arthritis, or other wrist joint disorders.

### **Key Market Drivers**

#### **Increasing Prevalence of Wrist Disorders**

Wrist disorders, ranging from post-traumatic injuries to degenerative conditions like osteoarthritis and rheumatoid arthritis, have become increasingly prevalent worldwide. This rise in wrist-related ailments has emerged as a significant driver in propelling the growth of the Global Total Wrist Replacement Market. Modern lifestyles often involve repetitive wrist movements, such as extended hours of typing on keyboards, using smartphones, or engaging in activities like gaming. These activities can lead to overuse injuries and conditions like carpal tunnel syndrome. Participation in sports and

recreational activities carries a risk of wrist injuries, including fractures, dislocations, and ligament tears. Athletes and active individuals are prone to such injuries, and these incidents contribute to the growing pool of wrist-related cases. As the global population ages, the prevalence of degenerative wrist conditions, such as osteoarthritis and rheumatoid arthritis, is increasing. These conditions often lead to chronic wrist pain and reduced mobility, driving individuals to seek surgical solutions. Wrist disorders can have a profound impact on a person's quality of life. Chronic wrist pain, limited mobility, and reduced grip strength can hinder daily activities, including basic tasks like dressing, cooking, and driving. Individuals with wrist disorders often experience discomfort and a decreased ability to participate in social and recreational activities. As a result, many seek medical interventions to regain functionality and improve their overall well-being. Advancements in surgical techniques and implant materials have made wrist replacement procedures increasingly effective and accessible. Surgeons can now offer patients reliable solutions to alleviate pain and restore wrist function. These innovations, coupled with a better understanding of wrist biomechanics, have broadened the scope of wrist replacement surgery. Traditionally, wrist replacement procedures were performed on older patients with severe arthritis. However, due to improved surgical outcomes and expanded indications, a broader range of patients is now considered eligible for wrist replacement. This includes younger individuals with post-traumatic injuries who may benefit from early intervention to prevent long-term wrist dysfunction.

### Expanded Indications for Surgery

In recent years, the field of orthopedics has witnessed a significant transformation with the advent of advanced surgical techniques and innovative medical devices. Total wrist replacement surgery, a procedure designed to alleviate pain and improve wrist function in patients with severe wrist joint degeneration, has been gaining prominence as a viable treatment option. As the demand for this procedure continues to rise, so does the growth potential of the Global Total Wrist Replacement Market. One of the key drivers behind this market expansion is the expanding indications for surgery, which has broadened the scope of patients who can benefit from this life-changing procedure. Total wrist replacement, also known as wrist arthroplasty, is a surgical procedure that involves replacing the damaged wrist joint with an artificial joint made of metal and plastic components. This procedure is typically recommended for individuals suffering from advanced wrist arthritis, traumatic injuries, or other conditions that severely affect wrist functionality. Historically, total wrist replacement was reserved for patients with end-stage wrist arthritis, leaving many others with limited options for treatment. In recent years, the landscape of total wrist replacement surgery has evolved significantly. This

evolution is primarily attributed to advancements in surgical techniques, prosthetic implant designs, and improved patient outcomes. As a result, the indications for surgery have expanded, making this procedure accessible to a broader range of patients. Total wrist replacement was initially used as a last resort for patients with degenerative joint diseases. However, it has now become a valuable option for individuals who have sustained traumatic wrist injuries, including fractures and dislocations. The procedure can restore wrist function and alleviate pain in such cases, offering a path to recovery for patients who might otherwise face a lifetime of discomfort and limitations. Traditionally, total wrist replacement was considered a treatment primarily for elderly patients. Today, younger individuals with debilitating wrist conditions, such as rheumatoid arthritis or congenital anomalies, are increasingly benefiting from the procedure. Improved implant durability and longevity have made it a feasible option for this demographic. Total wrist replacement has also found a role in revision surgeries. Patients who have previously undergone unsuccessful wrist surgeries or have experienced complications can turn to total wrist replacement as a means of correcting these issues and regaining wrist function.

### Improved Rehabilitation Protocols

The field of orthopedics is continually evolving, offering innovative solutions to improve the quality of life for patients with debilitating joint conditions. Total wrist replacement surgery has emerged as a promising option for those suffering from severe wrist joint degeneration. While surgical techniques and implant designs have improved over the years, the key to unlocking the full potential of the Global Total Wrist Replacement Market lies in the development and implementation of improved rehabilitation protocols. These protocols are pivotal in ensuring patients regain optimal wrist function, leading to increased confidence among patients and healthcare providers, which, in turn, stimulates market growth. Rehabilitation is an integral component of the recovery process following total wrist replacement surgery. It encompasses a range of exercises, therapies, and interventions aimed at enhancing wrist mobility, strength, and overall function. An effective rehabilitation program not only accelerates the healing process but also plays a vital role in preventing complications and optimizing the long-term success of the procedure. The primary goal of total wrist replacement surgery is to improve the quality of life for patients by alleviating pain and restoring wrist function. When rehabilitation protocols are optimized, patients are more likely to experience improved outcomes, leading to higher patient satisfaction and confidence in the procedure. Positive patient experiences encourage word-of-mouth referrals and increase the demand for total wrist replacement surgeries. Comprehensive rehabilitation helps patients avoid complications such as stiffness, muscle weakness, or joint

instability that can occur post-surgery. When complications are minimized, patients are more likely to have a successful recovery, fostering trust in the procedure and prompting more individuals to consider total wrist replacement as a viable treatment option. Advanced rehabilitation protocols are designed to expedite the healing process and reduce recovery times. Patients are eager to return to their normal daily activities as quickly as possible, and shorter recovery periods make total wrist replacement a more appealing choice. This trend contributes to market growth as more patients opt for the procedure.

### Geographic Expansion

The Global Total Wrist Replacement Market is experiencing steady growth as advancements in medical technology and surgical techniques continue to make wrist arthroplasty a viable option for individuals suffering from debilitating wrist conditions. While the market has seen significant progress, one of the key factors that can further boost its growth is geographic expansion. Expanding the reach of total wrist replacement procedures to underserved regions and countries can unlock new opportunities for both patients and medical device manufacturers, ultimately propelling the market to new heights. Total wrist replacement surgery has historically been concentrated in regions with well-established healthcare infrastructure and access to advanced medical technology. These regions include North America, Western Europe, and parts of Asia. However, the need for wrist arthroplasty is global, transcending geographical boundaries. Patients worldwide, including those in developing nations, grapple with debilitating wrist conditions that can significantly impact their quality of life. Expanding the availability of total wrist replacement procedures to underserved regions ensures that more patients have access to the treatment they need. Geographic expansion can bridge the gap between demand and supply, offering hope to individuals who may have previously lacked access to specialized orthopedic care. As total wrist replacement becomes more accessible globally, the market for wrist arthroplasty devices and related products grows exponentially. Manufacturers and medical device companies can tap into new markets, increasing their sales and market share. Geographic expansion necessitates the training and collaboration of local healthcare professionals, including surgeons. This collaboration can lead to the exchange of knowledge and expertise, benefiting both patients and the medical community. Surgeons from different regions can learn from each other's experiences, contributing to the improvement of surgical techniques and patient outcomes. Establishing total wrist replacement centers in underserved regions can contribute to economic development by creating job opportunities and attracting medical tourism. This can further boost the local economy and infrastructure. Expanding the geographic reach of total wrist

replacement can lead to more diverse patient populations, encouraging research and innovation in the field. Researchers can study the impact of wrist arthroplasty on different demographics, potentially uncovering new insights and improving treatment outcomes.

## Key Market Challenges

### Regulatory Complexity

One of the foremost challenges facing the Total Wrist Replacement Market is navigating the intricate web of regulatory requirements across different countries and regions. Each jurisdiction may have its own set of rules, approval processes, and quality standards for medical devices and surgical procedures. Complying with these regulations and obtaining necessary approvals can be a time-consuming and costly endeavor for manufacturers.

### Implant Durability

While total wrist replacement procedures have seen improvements in implant design and materials, concerns about long-term durability remain. Patients often require these implants to last for decades, and any premature failure can lead to costly revision surgeries and complications. Developing wrist implants that can withstand the rigors of daily life for extended periods is a constant challenge for manufacturers.

### Surgical Expertise

Total wrist replacement is a specialized surgical procedure that requires a high level of expertise. Ensuring that an adequate number of skilled surgeons are available to perform these procedures is crucial. Surgeon training and education programs must be developed and maintained to meet the growing demand for these surgeries.

### Cost Factors

The cost of total wrist replacement surgery can be a significant barrier for many patients, particularly in regions without comprehensive healthcare coverage. High procedural costs, including implant expenses and post-operative care, may limit access to the procedure. Cost-effective solutions and reimbursement strategies need to be explored to make wrist arthroplasty more accessible.

## Key Market Trends

### Personalized Implants

One of the most exciting trends in the Total Wrist Replacement Market is the move toward personalized implants. 3D printing and advanced imaging techniques are enabling surgeons to create custom implants tailored to a patient's unique anatomy. These personalized implants can lead to better fit, reduced complications, and improved longevity, ultimately benefiting patient recovery.

### Enhanced Materials

Materials science is playing a pivotal role in improving the longevity and performance of wrist implants. Advances in materials, including high-strength ceramics and wear-resistant plastics, are leading to implants with greater durability and reduced wear over time. This trend promises to extend the lifespan of wrist implants and reduce the need for revision surgeries.

### Telehealth and Remote Monitoring

Telehealth and remote monitoring have gained widespread acceptance in the wake of the COVID-19 pandemic. These technologies are now being integrated into post-operative care for total wrist replacement patients. Remote follow-up appointments, physical therapy sessions, and patient education can enhance accessibility to care, especially for those living in remote areas or with mobility limitations.

### Value-Based Healthcare

Value-based healthcare models emphasize achieving the best patient outcomes at the lowest possible cost. As healthcare systems worldwide shift toward value-based care, there is a growing emphasis on measuring and improving the quality of total wrist replacement procedures. This trend encourages providers to focus on long-term patient satisfaction and functional outcomes.

### Segmental Insights

### Technology Insights

Based on the category of Technology, the Total Wrist Fusion (TWF) segment emerged

as the dominant player in the global market for total wrist replacement in 2022. Total wrist fusion surgery, also referred to as total wrist arthrodesis (TWF), is a medical procedure that involves stabilizing or immobilizing the wrist joint by fusing the forearm bone with the small wrist bones. This surgical intervention is typically recommended to alleviate pain stemming from severe wrist trauma. Total wrist arthrodesis is considered when conventional treatments such as rest, medication, injections, and physical therapy fail to provide relief.

The utilization of total wrist fusion surgery is anticipated to experience robust growth throughout the forecast period, owing to several factors. Firstly, the increasing elderly population, which is more susceptible to arthritis and arm injuries, is expected to drive both demand and supply for this procedure. According to the October 2021 report from the World Health Organization, the global population of individuals aged 60 and above is projected to rise from 1 billion in 2020 to 2.1 billion by 2050. Given that the older demographic is more prone to musculoskeletal conditions like arthritis and osteoporosis, the need for total wrist fusion is projected to surge in the coming years. Furthermore, osteoarthritis is recognized as one of the most prevalent joint disorders among individuals aged 65 and older. Consequently, the growing elderly population is anticipated to stimulate the demand for total wrist fusion, thereby bolstering the growth of this particular segment.

Additionally, prominent industry players are actively involved in developing innovative products and technologies within this field. For example, in October 2021, Tyber Medical LLC received clearance from the United States Food and Drug Administration for its expanded range of anatomical plating systems, including those designed for wrist fusion. Moreover, in September 2021, Anika Therapeutics, Inc., a global leader in joint preservation, unveiled its WristMotion Total Wrist Arthroplasty (TWA) System during the American Society for Surgery of the Hand (ASSH) 2021 annual meeting in San Francisco.

## End-User Insights

Hospitals and clinics are poised to dominate the Global Total Wrist Replacement Market due to several compelling reasons. Firstly, these healthcare facilities provide the necessary infrastructure and specialized expertise required for complex orthopedic procedures such as total wrist replacement. Patients seeking treatment for debilitating wrist conditions often rely on hospitals and clinics for comprehensive care, from diagnosis and surgery to post-operative rehabilitation. Moreover, these establishments have the capability to invest in state-of-the-art medical equipment and technologies,

ensuring the highest standards of surgical precision and patient safety. Additionally, hospitals and clinics often collaborate with leading orthopedic surgeons and offer a wide range of medical services, making them preferred choices for patients seeking specialized wrist arthroplasty procedures. This dominance is further reinforced by the ability of hospitals and clinics to provide a seamless continuum of care, enhancing patient confidence and ensuring optimal surgical outcomes.

## Regional Insights

North America is anticipated to maintain a substantial share of the total wrist replacement market, and this trend is projected to persist throughout the forecast period. Factors contributing to this dominance include the increasing incidence of arthritis cases and a rising prevalence of arm injuries within the region, coupled with the significant presence of key market players. To illustrate, a July 2022 article published on NCBI highlighted that approximately 13.6% of the United States population was affected by wrist arthritis, translating to one in seven individuals. Similarly, a 2021 article from the Ohio State University reported that a staggering 6 million Americans suffered bone fractures annually, constituting 16% of all musculoskeletal injuries in the United States, with more than 40% of these fractures occurring at home. Furthermore, a January 2021 NCBI article revealed that over 16.5% of Canadians, approximately 4.8 million people, received diagnoses of various forms of arthritis in 2021. Consequently, the escalating prevalence of arthritis and bone fractures is expected to drive the demand for total wrist replacement procedures in North America, consequently fostering market growth. Additionally, the increasing number of total wrist replacement surgeries performed in the region presents lucrative opportunities, with innovations like the KinematX total wrist device by Extremity Medical, designed to mimic natural wrist motion in patients with arthritis, contributing to market expansion.

## Key Market Players

Small Bone Innovations Inc

Zimmer Biomet Holdings Inc

Integra LifeSciences Corp

Johnson & Johnson

Acumed Inc



Medartis AG

Stryker Corp

DJO Global Inc

Anika Therapeutics Inc

Skeletal Dynamics LLC

Report Scope:

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

Total Wrist Replacement Market, By Technology:

Total Wrist Replacement (TWR)

Total Wrist Fusion (TWF)

Total Wrist Replacement Market, By End-User:

Hospitals & Clinics

Ambulatory care Centers

Others

Total Wrist 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 Total Wrist Replacement Market.

### Available Customizations:

Global Total Wrist 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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