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Implantable Medical Devices

US Industry Study with Forecasts for **2011 & 2016**

Study #2255 | October 2007 | \$4500 | 374 pages

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INDUSTRY STRUCTURE

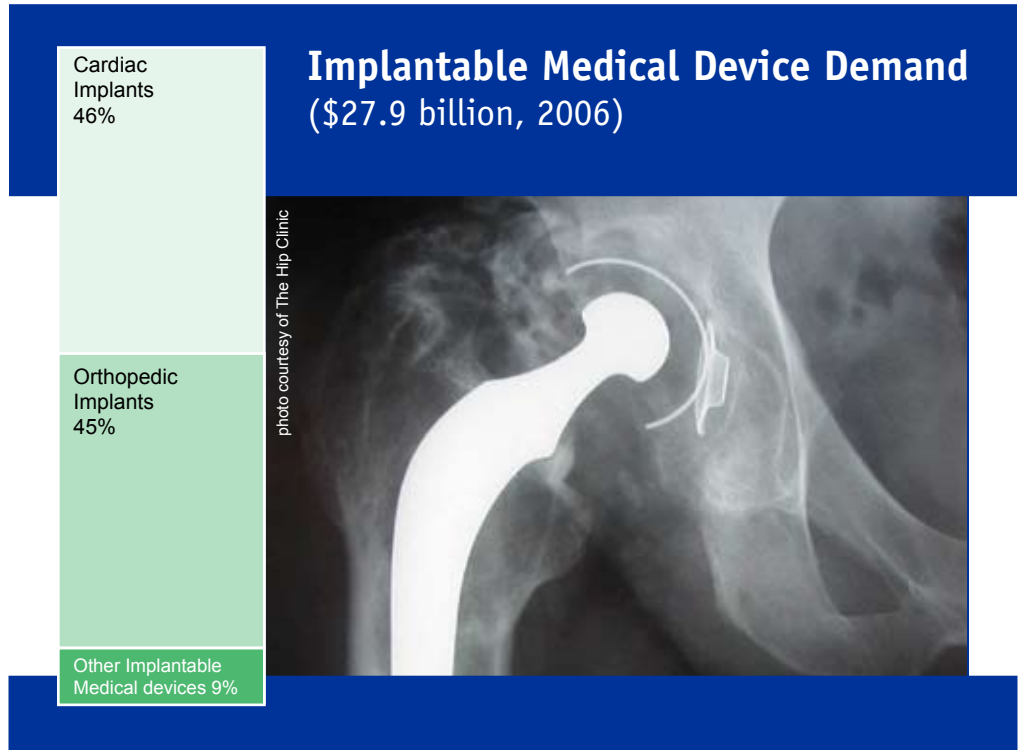
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Shortcomings in existing drug therapies will promote increasing use of implantable devices in the treatment of cardiovascular, orthopedic, neurological, ophthalmic and various other chronic disorders.

Cardiac implants to stay dominant category

Demand for implantable medical devices is projected to increase 9.3 percent annually to \$43.6 billion in 2011. Although weakened over the past few years by product recalls and safety controversies, especially in the cardiac implant segment, growth will remain strong. Based on the prevalence and mortality risk of heart disease, cardiac implants will remain the top-selling group of implantable medical devices, with demand expanding 9.0 percent annually to \$19.6 billion in 2011. Cardiac resynchronization therapy devices (CRT-Ds), carotid and drug-eluting coronary stents, endovascular stent-grafts, implantable heart monitors, and tissue heart valves will post the strongest gains. Outcome advantages over drugs in the treatment of congestive heart failure will boost the patient base for CRT-Ds.

Carotid stents will build up demand due to new, improved product introductions and effectiveness in stroke prevention. Next-generation devices composed of thinner struts will enhance the safety and performance of drug-eluting coronary stents, revitalizing their growth opportunities in the treatment of arterial blockage. Demand for endovascular stent-grafts will advance rapidly based on life-saving benefits in treating aortic aneurysms. Advantages related to the early detection of heart attack symptoms will broaden the use of implantable heart monitors among patients with serious cardiovascular disorders.



Orthopedic, other implants to also show rapid gains

Demand for orthopedic implants is forecast to exceed \$19 billion in 2011, up 8.8 percent annually from 2006. Bone cement, based on the availability of new, high value-added formulations and breadth of applications served, will record the fastest gains. Tissue and spinal implants will also post strong growth in demand as advances in fusion, fixation and neurological stimulating technologies promote their increasing use in the treatment of spinal and various other orthopedic conditions. The market for reconstructive implants and trauma fixation products will expand moderately, benefitting from the increas-

ing prevalence of deteriorated joint conditions and fracture injuries.

Other implantable medical devices will post demand of \$4.9 billion in 2011, up more than 13 percent annually from 2006. Growth will be led by implantable stimulators for neurological conditions, brachytherapy for prostate cancer indications, cochlear devices for restoring hearing loss, and gastric bands for obesity intervention. These products offer significant performance and outcome advantages over alternative treatments. Among other implantable medical devices, silicone gel-filled breast implants and dermal and tissue implants for cosmetic surgery will fare the best, reflecting widening popularity among the appearance-conscious population.

Sample Text, Table & Chart

ORTHOPEDIC IMPLANTS

Internal Spinal Fixation Devices

Following upward trends in the number of spinal fusion demand for internal spinal fixation devices is projected to increase to \$5 billion in 2011. Included in this category are rods, screws and nails sold individually and as sets. These devices are available in a variety of designs and sizes of the spine (cervical, lumbar) and can be implanted via a minimally-invasive approach -- anterior or posterior.

**SAMPLE
TEXT**

Most plates, rods, screws and nails used in spinal fusion are composed of titanium, titanium alloy or stainless steel. Plates serve as main connectors and are affixed to vertebrae with wires and/or screws. In less complex applications, hooks, wires or screws can be used for primary connection to bone grafts or substitutes. Internal spinal fixation products provide stability and help restore proper anatomical alignment in the surgical treatment of injuries, deformities, degenerative disk conditions, and infectious and tumor-related spinal diseases.

Contract prices of internal spinal fixation devices to hospitals and health care purchasing groups range from \$200 each for basic, non-variable angle pedicle screws to over \$900 for plate systems. Sets containing all devices for a specific procedure can cost \$2,000 or more. Leading producers of internal spinal fixation devices for the US market include Abbott Spine, Biomet, Medtronic Sofamor Danek, DePuy Spine (Johnson & Johnson), Synthes, Stryker and Zimmer. Products are sold on the basis of price, design and ease of use.

Most producers of internal spinal fixation devices have focused on developing complete systems for both broad-based and very specific

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TABLE VII-1

OTHER IMPLANTABLE MEDICAL DEVICE DEMAND BY PRODUCT GROUP (million dollars)

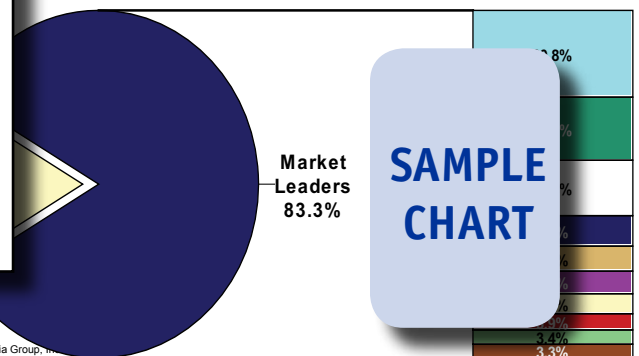
Item	1996	2001	2006	2011	2016
Resident Population (million)	260	270	280	290	300
\$ other implantables/capita	10	12	15	18	20
Other Implantable Medical Devices	2600	3240	4200	5220	6000
Neurological Stimulators	0	0	0	0	0
Ophthalmic Implants	0	0	0	0	0
Breast Implants	0	0	0	0	0
Drug Implants	0	0	0	0	0
Urological Implants	0	0	0	0	0
Cochlear Implants	0	0	0	0	0
Dermal Implants	0	0	0	0	0
All Other Implantables	0	0	0	0	0
% other	0.38	0.45	0.57	0.70	0.80
Implantable Medical Device Demand	910	1134	1440	1800	2100

**SAMPLE
TABLE**

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CHART VIII-1

IMPLANTABLE MEDICAL DEVICE (IMD) MARKET SHARE BY COMPANY, 2006 (\$27.9 billion)



**SAMPLE
CHART**

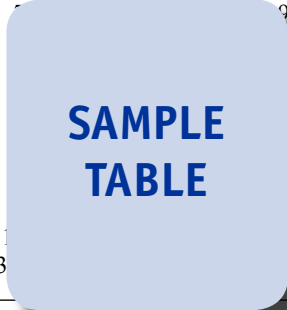
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Sample Profile, Table & Forecast

TABLE V-5
HEART-RELATED GRAFT DEMAND BY TYPE
 (million dollars)

Item	1996	2001	2006	2011	2016
PAD* Conditions (million)					9.3
\$ heart-related grafts/condition					74
Heart-Related Graft Demand					50
Vascular & Endovascular Grafts					50
Peripheral Grafts					00
Arterial-to-Venous Grafts					00
% heart-related grafts					8
Cardiac Implant Demand	3				00

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COMPANY PROFILES

Cyberonics Incorporated

Cyberonics Building
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Sales: \$1
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 Employe

Key Prod

Cyb... at designs, develops, produces and markets implantable neurological stimulator systems for the treatment of epilepsy, chronic depression, and other neurological disorders, psychiatric diseases and other conditions. The Company markets its products in more than 70 countries.

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“Led by endovascular stent grafts for the treatment of aortic aneurysms, demand for heart-related grafts will increase 8.8 percent annually to \$1.7 billion in 2011. Endovascular stent grafts will generate rapid growth opportunities, spurred by new product introductions and a large, expanding prevalence of aneurysm conditions in the population. Many of these conditions have not been diagnosed and only about 20 percent of diagnosed cases have been treated. Demand for other heart-related grafts, including vascular, peripheral and AV types, will ...”

--Section V, pg. 126

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OTHER STUDIES

Medical & Dental Adhesives & Sealants

US demand for medical and dental adhesives and sealants will rise 7.6% annually through 2011, driven by continuing new product development and increasing acceptance in surgical and consumer settings. Opportunities are expected for cyanoacrylate, polyethylene glycol and various plasma and protein types. This study analyzes the US market for medical adhesives and sealants, with forecasts for 2011 and 2016 presented by product and market. It also evaluates company market share and profiles major suppliers.

#2201 05/2007..... \$4400

Disposable Medical Supplies

US demand for disposable medical supplies will grow 4.9% annually through 2011. Best prospects include dry powder inhalers, prefilled syringes and transdermal patches for drug delivery; blood glucose test strips for diabetes monitoring; tissue sealants for wound closure; and daily contact lenses. This study analyzes the US disposable medical supply industry, with forecasts for 2011 and 2016 presented by product, market and raw material. It also evaluates company market share and profiles industry competitors.

#2196 05/2007..... \$4500

Nanotechnology in Health Care

US demand for nanotechnology medical products will grow 17.5% annually through 2011, driven by the critical need for new or improved therapies and diagnostics. The greatest short-term impact will be in cancer and central nervous system disorders, followed by orthopedic nanoimplants. This study analyzes the \$23.6 billion US nanotech medical product industry to 2011, 2016 and 2021 by material, product and application. The study also reviews product development activities and profiles major players.

#2168 02/2007..... \$4500

Biocompatible Materials

US demand for biocompatible materials will grow 6.6% yearly through 2010. Synthetic polymers will remain dominant based on quality, performance and cost advantages in most applications. Ceramics will grow the fastest, driven by improved properties and processing ease. Hyaluronic acid and collagen will pace the natural polymer segment. This study analyzes the \$2.7 billion US biocompatible industry to 2010 and 2015 by material and application. It also evaluates market share and profiles major players.

#2111 09/2006..... \$4400

Cosmetic Surgery Products

US demand for cosmetic surgery products will grow 9.1% annually through 2010, driven by an obsession with youth coupled with an aging population and greater product availability. Nonsurgical markets (e.g., injections, dermal resurfacing, micro-dermabrasion) will lead gains based on consumer preferences for less invasive treatments. This study analyzes the \$1.6 billion US cosmetic surgery product industry to 2010 and 2015 by material, product and procedure. It also evaluates market share and profiles major players.

#2099 09/2006..... \$4300

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