Orthopedic Implants

US Industry Study with Forecasts for **2012 & 2017**

Study #2372 | July 2008 | $4500 | 233 pages

The Freedonia Group
767 Beta Drive
Cleveland, OH • 44143-2326 • USA
Toll Free US Tel: 800.927.5900 or +1 440.684.9600
Fax: +1 440.646.0484
E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Orthopedic Implants

US Industry Study with Forecasts for ***2012 & 2017***

Table of Contents

Orthopedic Implants

US Industry Study with Forecasts for ***2012 & 2017***

List of Tables

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

PRODUCTS

MARKETS

INDUSTRY STRUCTURE

List of Charts

MARKET ENVIRONMENT

PRODUCTS

INDUSTRY STRUCTURE

Orthopedic Implants

US Industry Study with Forecasts for ***2012 & 2017***

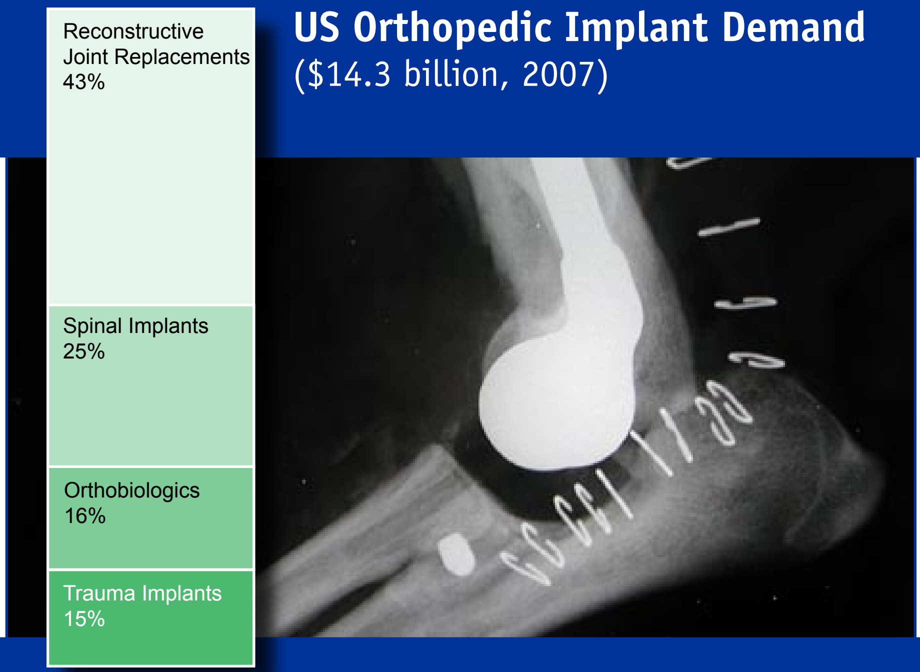
The key reconstructive joint replacement segment will benefit from an older and more physically active population, which will increase the prevalence of degenerative and injured joints.

Joint replacement to remain largest segment

US demand for orthopedic implants will increase 8.9 percent annually to nearly $22 billion in 2012, with all major segments providing strong growth opportunities. The market for reconstructive joint replacements, which is forecast to reach $9 billion in 2012, will gain upward momentum from an aging population and the widespread prevalence of physically active lifestyles. These trends will expand the number of persons suffering from degenerative and injured joints.

Knees and hips, which are highly vulnerable to degeneration caused by arthritic conditions, will continue to account for the vast majority of reconstructive joint replacements. Continuing advances in materials and design will improve the safety and performance features of knee and hip implants and encourage their expanding use in the treatment of severe arthritis. Among other reconstructive joint replacements, shoulder systems will post the strongest demand and realize the best growth opportunities based on advantages over alternative therapies in the reduction of pain and restoration of mobility.

US Orthopedic Implant Demand
($14.3 billion, 2007)



Spinal implants, orthobiologics to be fastest growing

Advances in product technologies and related surgical techniques, coupled with an increasing prevalence of chronic back conditions, will create strong growth opportunities for spinal implants. Demand for these products is forecast to rise more than eleven percent annually. Fixation devices and artificial discs used in spinal fusion and motion preservation surgeries, especially procedures for the repair of vertebrae and replacement of degenerative discs, will account for the largest share of the market and best growth opportunities. Due to outcome advantages over alternative drug and physical therapies, surgery is emerging as the preferred treatment option for many spinal cord injuries and abnormalities. This trend reflects the increasing availability of high value-added devices such as fusion cages and artificial discs.

As breakthroughs in biotechnology and nanotechnology lead to the commercialization of new and improved products, orthobiologics will realize strong growth opportunities. Demand for these products is forecast to grow 9.1 percent annually to 2012. Growth factors, grafts and synthetic materials for the replacement and fortification of diseased and damaged bone are among the orthobiologics expected to fare especially well in the marketplace, benefitting from new product introductions and expanding applications in the support of spinal and trauma procedures. Bone cement, viscosupplementation substances and artificial tissue implants are also well-positioned to capture strong growth in demand.

Orthopedic Implants

US Industry Study with Forecasts for ***2012 & 2017***

Freedonia

Sample Text, Table & Chart

TABLE III-4

**RECONSTRUCTIVE HIP REPLACEMENT DEMAND BY TYPE
(million dollars)**

Item	1997	2002	2007	2012	2017
Hip Replacement Procedures (000)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]55
000$ implants/procedure	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]1
Reconstructive Hip Replacements	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Metal-on-Plastic Implants	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Metal-on-Metal Implants	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Ceramic Implants	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
% hips	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]2
Reconstructive Joint Replacements	[illegible]	[illegible]	[illegible]	[illegible]	15200

SAMPLE TABLE

PRODUCTS

Hip Replacement Implants

Most of the same factors that influence the market for
also drive the market for hip implants. The increasing prev
osteoarthritis and osteoporosis conditions in the aging popu
expand the number of patients requiring total or partial hip
Advances in product design and technology will make reco
procedures more adaptable to younger individuals. In contr
conditions, injured and degenerative hips are typically less
to alternative treatments and require replacement in a higher percentage of cases. For this reason, demand for reconstructive hip implants is projected to increase at a faster pace than knee systems, rising 8.3 percent
in 2012.

SAMPLE TEXT

ctive procedures replace degenerative hip joint
ial prosthetic implants. The hip joint consists of
etabulum and the femoral head. The acetabulum,
haped bone which attaches to the pelvis. The
shaped structure located on top of the femur (thigh bone). This "ball and socket" structure controls a wide range of mobile activity, including sitting, standing and walking.

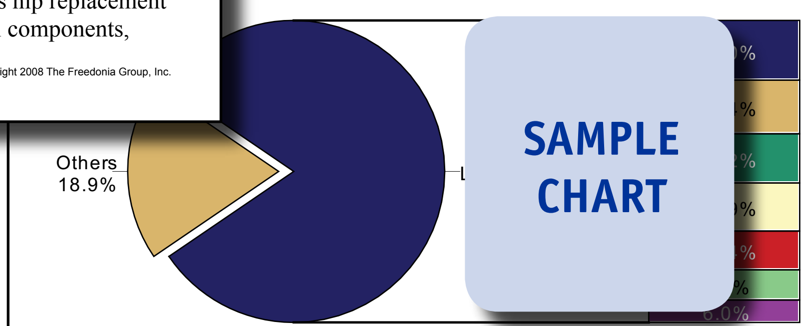
In total hip replacement surgery, an artificial socket composed of high-density plastic, plastic-lined metal or ceramic replaces the acetabulum. The femoral head is replaced by a metal or ceramic ball-shaped implant. A metal stem, which attaches to the femoral head replacement, is inserted inside the femur bone, connecting the artificial hip to the leg.

Similar to knee prosthesis, hip replacement systems can be implanted through cemented, cementless or hybrid techniques. Cemented implants enable a shorter patient recovery period, but are prone to loosening, which reduces overall longevity. Cementless hip replacement systems allow natural bone to grow around the artificial components,

72

CHART V-1

**…HOPEDIC IMPLANT MARKET SHARE, 2007
($14.3 billion)**



SAMPLE CHART

Click here to purchase online

Order now, click here!

Sample Profile, Table & Forecast

TABLE IV-4

PHYSICIANS' OFFICE ORTHOPEDIC IMPLANT DEMAND
(million dollars)

Item	1997	2002	2007	2012	2017
Number of Physicians (000)					30
$ implants/physicians					11
Phys' Office Ortho Implant Demand					50
Orthobiologics					70
Trauma Implants					80
% physicians' offices					.1
Orthopedic Implant Markets	4				00

SAMPLE TABLE

COMPANY PROFILES

Osteotech Incorporated
51 James Way
Eatontown, NJ 07724
732-542-280
http://www.o

Revenues: $
US Revenues
Employment

Key Products ... a implants

SAMPLE PROFILE

Osteotech develops, manufactures and markets biologic and biomaterial products, and device systems for use in musculoskeletal surgical applications. The Company operates through five segments: Demineralized Bone Matrix, Hybrid/Synthetic, Traditional Tissue, Spinal Allograft and Client Services.

Osteotech participates in the US orthopedics implant industry through all five segments. Through these segments, the Company is involved in the processing of human bone and tissue for transplant applications, as well as the production of other biomaterials and devices for spinal, trauma and total joint revision procedures, among others. Osteotech conducts manufacturing and biomaterial processing activities at a 73,000-square-foot facility in Eatontown, New Jersey.

The Demineralized Bone Matrix segment, which recorded revenues of $66 million in 2007, processes and markets demineralized bone matrix (DBM) products under the GRAFTON brand name. The segment's demineralization process yields allograft bone tissue with osteoinductive and osteoconductive capabilities from cortical bone. GRAFTON products are available in a number of forms, including gel,

200

"Based on the ongoing expansion and diversification of patient activity, demand for orthopedic implants in physicians' offices will increase 9.7 percent annually to $890 million in 2012. Similar to the outpatient segment, growth opportunities will remain divided between internal fixation devices for fracture repair and hyaluronic acid for viscosupplement therapy. Physicians' offices will emerge as an attractive niche market for these products. More importantly ..."
--Section IV, pg. 143

Order Information

Five Convenient Ways to Order

INDUSTRY MARKET RESEARCH FOR BUSINESS LEADERS, STRATEGISTS, DECISION MAKERS

Freedonia®

ONLINE: www.freedoniagroup.com

MAIL: Print out and complete the order form and send to The Freedonia Group (see address at the bottom of this form)

PHONE: Call toll free, 800.927.5900 (US) or +1 440.684.9600

FAX: +1 440.646.0484 (US)

EMAIL: info@freedoniagroup.com

Free Handling & Shipping

There is NO charge for handling or UPS shipping in the US. Expect delivery in 3 to 5 business days. Outside the US, Freedonia provides free airmail service. Express delivery is available at cost.

Orders Outside of the US

Checks must be made payable in US funds, drawn against a US bank and mailed directly to The Freedonia Group. For wire transfers please contact our customer service department at info@freedoniagroup.com. Credit cards accepted.

Credit Card Orders

For convenience, Freedonia accepts American Express, MasterCard or Visa. Credit card purchases must include account number, expiration date and authorized signature.

Save 15%

If you order three (3) different titles at the same time, you can receive a 15% discount. If your order is accompanied by a check or wire transfer, you may take a 5% cash discount (discounts do not apply to Corporate Use Licenses).

Corporate Use License

Now every decision maker in your organization can act on the key intelligence found in all Freedonia studies. For an additional $2300, companies receive unlimited use of an electronic version (PDF) of the study. Place it on your intranet, e-mail it to coworkers around the world, or print it as many times as you like,

Click here to learn more about the Corporate Use License

Order Form

F-WEB.4500

Orthopedic Implants.. $4500

☐ Corporate Use License (add to study price) * +$2300

___ Additional Print Copies @ $500 each *

Total (including selected option) $________

☐ Enclosed is my check (5% discount) drawn on a US bank and payable to The Freedonia Group, Inc., in US funds (Ohio residents add 7.75% sales tax)

☐ Bill my company ☐ American Express ☐ MasterCard ☐ Visa

MM YY

Credit Card # Expiration

Signature ____________________

Name ____________________

Title ____________________

Company ____________________

Division ____________________

Street ____________________ (No PO Box please)

City/State/Zip ____________________

Country ____________________

Phone ____________________ Fax ____________________

Email ____________________

* Please check appropriate option and sign below to order an electronic version of the study.

☐ Corporate Use License Agreement

The above captioned study may be stored on the company's intranet or shared directory, available to company employees. Copies of the study may be made, but the undersigned represents that distribution of the study will be limited to employees of the company.

Signature ____________________

☐ Individual Use License Agreement

The undersigned hereby represents that the above captioned study will be used by only ___ individual(s) who are employees of the company and that the study will not be loaded on a network for multiple users. In the event that usage of the study changes, the Company will promptly notify Freedonia of such change and will pay to Freedonia the appropriate fee based on Freedonia's standard fee schedule then in effect. Note: Entire company corporate use license, add $2300; one additional user, add $500; two additional users, add $1000; three additional users, add $1500.

Signature ____________________

Other Studies

Cardiac Implants

The US cardiac implant industry is analyzed in this study. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by type (e.g., defibrillators, pacemakers, drug-eluting and other coronary stents, heart valves, vascular and related grafts, vena cava filters, ventricular-assist devices, implantable heart monitors), and market (e.g., hospitals, outpatient facilities, physicians' offices). The study also considers market environment factors, evaluates company market share and profiles industry competitors.

#2398 .... 09/2008.................... $4500

Cosmetic Surgery Products

This study analyzes the US cosmetic surgery product industry. It presents historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by raw material (e.g., microbial extracts, collagen, polymers); product (e.g., hair removal lasers, botulinum toxin, tissue fillers, breast implants, wound care disposables); and procedure (e.g., surgical reshaping, lifts and tucks, liposuction, laser treatments). The study also considers market environment factors, details industry structure and market share, and profiles industry participants.

#2389 .... 08/2008.................... $4600

Dental Products & Materials

US demand for dental products will rise 4.5% per year through 2012, aided by favorable population trends and continued interest in cosmetic dentistry. More concern about overall good health will provide added opportunities for mouthwash/dental rinses, sealants, fluoride treatments and other products. This study analyzes the US dental product and material industry, with forecasts for 2012 and 2017 by product and raw material. It also evaluates company market share and profiles leading industry competitors.

#2313 .... 03/2008.................... $4500

Drug Delivery Systems

US demand for drug delivery systems will grow 10% annually through 2012. Oral types will remain the largest drug delivery category while parenteral, inhalation and implantable systems grow the fastest. Parenteral formulations will eventually surpass oral dosages as the largest product group. This study analyzes the $80.2 billion US drug delivery system industry, with forecasts for 2012 and 2017 by material, type and application. It also evaluates company market share and profiles leading industry players.

#2294 .... 03/2008.................... $4500

Implantable Medical Devices

US medical implant demand will rise 9.3% yearly through 2011. Cardiac implants will remain the top-selling group, led by stents and defibrillators. Bone cement, tissue and spinal implants will pace gains in the orthopedic segment. Other fast-growing types include neurological stimulators, cochlear devices and gastric bands. This study analyzes the $27.9 billion US medical implant industry, with forecasts for 2011 and 2016 by material and product. It also evaluates market share and profiles major players.

#2255 .... 10/2007.................... $4500

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unibiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

• Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

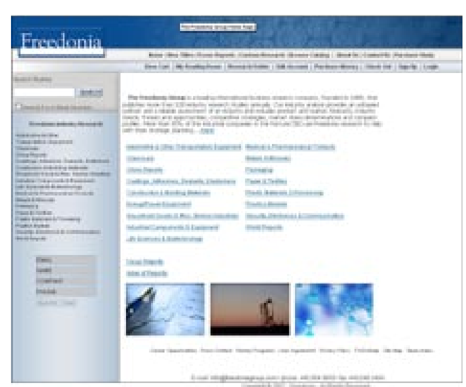
Click here to learn more about Freedonia

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

Click here to learn more about Custom Research



Click here for complete title list

Click here to visit freedoniagroup.com

The Freedonia Group, Inc. 767 Beta Drive • Cleveland, OH • 44143-2326 • USA • Web site: www.freedoniagroup.com
Tel US: 800.927.5900 or +1 440.684.9600 • Fax: +1 440.646.0484 • e-mail: info@freedoniagroup.com