Orthopedic Implants

US Industry Study with Forecasts for 2012 & 2017

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INDUSTRY STRUCTURE
1 Orthopedic Implant
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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.

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

Sample Text, Table & Chart

PRODUCTS

Hip Replacement Implants

Most of the same factors that influence the market for knee implants also drive the market for hip implants. The increasing prevalence of osteoarthritis and osteoporosis conditions in the aging population expand the number of patients requiring total or partial hip replacements. Advances in product design and technology will make reconstructive procedures more adaptable to younger individuals. In contrast to knee conditions, injured and degenerative hips are typically less responsive 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 annually to $3.7 billion in 2012.

Reconstructive procedures replace degenerative hip joint with artificial prosthetic implants. The hip joint consists of the acetabulum and the femoral head. The acetabulum, a cup-shaped bone which attaches to the pelvis. The femoral head is a ball-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.

Sample Text,
“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
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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

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