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Implantable Medical Devices

US Industry Study with Forecasts for **2014 & 2019**

Study #2595 | April 2010 | \$4800 | 427 pages



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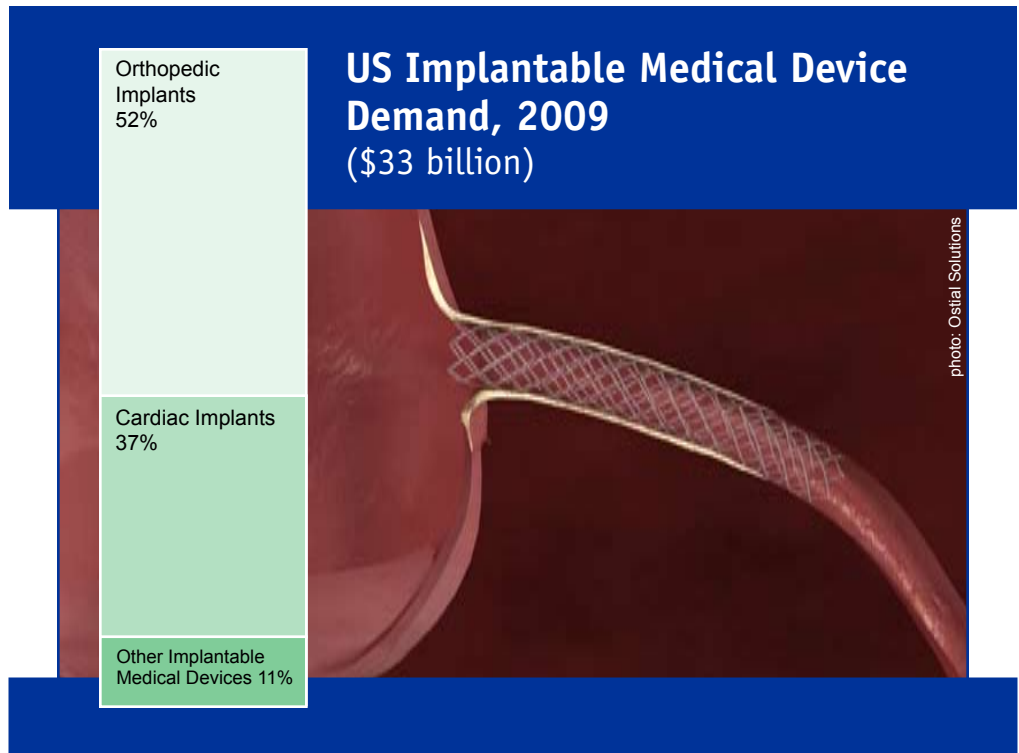
The development of next generation medical implants based on new technologies and improved materials, coupled with shortcomings in existing drug therapies, will underlie growth.

US demand to increase 8.3% yearly through 2014

US demand for implantable medical devices will increase 8.3 percent annually to \$49 billion in 2014. The development of next generation devices based on new technologies and improved materials will underlie growth. Shortcomings in existing drug therapies will promote the increasing use of implantable devices in the treatment and management of cardiovascular, orthopedic, neurological, ophthalmic and various other chronic disorders.

Spinal implants, orthobiologics to pace orthopedic segment

Demand for orthopedic implants will increase 8.8 percent annually through 2014, with all major product segments posting strong growth. The market for reconstructive joint replacements will gain upward momentum from improved products such as rotating platform knee replacements as well as from the aging US population and physically active lifestyle trends. Advances in implant products and related surgical technologies, coupled with an increasing prevalence of chronic back conditions, will create strong growth opportunities for spinal implants. Demand for these products will rise 11.0 percent annually through 2014. Fixation devices and artificial discs for spinal fusion will account for the best opportunities.



As advances in biotechnology lead to the commercialization of new and improved products, orthobiologics will realize strong opportunities through 2014.

Hyaluronic acid, growth factors, grafts and synthetic materials for bone fortification are among the orthobiologics expected to fare especially well in the marketplace. Upward trends in the number of fracture injuries attributable to demographic and lifestyle trends will boost demand for trauma fixation implants. The best growth prospects will emerge in anatomically shaped plating systems for complex fractures near joints and intramedullary nails for long bone fractures.

CRT devices, ICDs to be fastest growing cardiac implants

Demand for cardiac implants is projected to increase 7.5 percent annually through 2014. Cardiac resynchronization therapy (CRT) devices will post the fastest growth among pacing devices as they greatly improve therapeutic outcomes in congestive heart failure patients. Advantages over anti-arrhythmia drugs will keep implantable cardioverter defibrillators (ICDs) the preferred treatment for tachycardia. The lack of effective drugs for bradycardia will boost demand for implantable cardiac pacemakers.

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Sample Text, Table & Chart

CARDIAC IMPLANTS

Renal & Related Stents --The use of peripheral stent procedures to alleviate renal obstructions is expected to expand patient outcome advantages over such devices as urinary stents. Opportunities are anticipated as the increasing prevalence of renal artery stenosis, due to atherosclerosis, malignant renal artery stenosis, and renal artery aneurysms. The demand for renal stents is projected to expand to \$340 million, in 2010.

**SAMPLE
TEXT**

Renal and related stents typically incorporate a long, thin tubular design that provides for easy placement in the renal arteries or biliary tree. The range of devices includes both self-expanding and balloon expanding models. Average unit prices of renal and related stents range from \$500 to \$2,000 depending on design, materials and features. Abbott Vascular, CR Bard, Boston Scientific, Cook Group and Medtronic are among the suppliers of renal and related stents to the US market. Abbott Vascular offers the HERCULINK and OMNILINK peripheral biliary balloon- expandable stents and the XPERT, ABSOLUTE, XCEED and DYNALINK BILIARY self-expanding biliary stents. The renal and related stent line of CR Bard includes the LIFESTENT devices, which Abbott acquired from Edwards Lifesciences in January 2008. Boston Scientific's principal offering in this product group is the WALLSTENT, a self-expanding stent system for the treatment of biliary strictures.

Cook Group produces and markets the FORMULA 418 balloon-expandable biliary stents for the alleviation of renal and related conditions. These implants, which are used in the treatment of malignant neoplasms in the biliary tree, feature a new hybrid stent-cell design and ultra-low crossing profile. The r

177

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TABLE iv-6

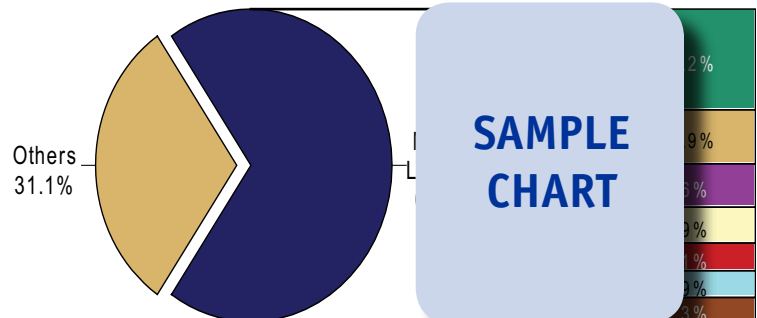
SPINAL IMPLANTS DEMAND BY PRODUCT GROUP (million dollars)

Item	1999	2004	2009	2014	2019
Spinal Fusion Procedures (000)					
000\$ implants/procedure					
Spinal Implants Demand					
Thoracolumbar Implants					
Intervertebral Spacers					
Motion Preservation Devices					
Cervical Implants					
Implantable Spinal Stimulators					
% spinal implants					
Orthopedic Implants Demand					

**SAMPLE
TABLE**

CHART VII-1

IMPLANTABLE MEDICAL DEVICES - MARKET SHARE BY COMPANY (\$32.9 billion, 2009)

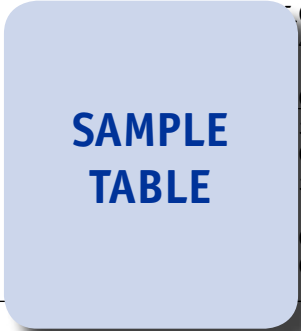


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE VI-5
DRUG IMPLANTS DEMAND BY TYPE
(million dollars)

Item	1999	2004	2009	2014	2019
Cancer History Patients (million)					
\$ drug implants/patient					
Drug Implants Demand					
Drug Inserts					
Brachytherapy					
Implantable Drug Pumps					
% drug implants					
Other Implantable Medical Devices					



COMPANY PROFILES

Endologix Incorporated
 Eleven Studebaker
 Irvine, CA 92618
 949-595-7200
<http://www.endologix.com>

Revenue
 US Prod
 Research
 Employr

Key Proc

Endologix is active in the US implantable medical devices industry through the production of the POWERLINK catheter and endoluminal stent graft system indicated for the treatment of abdominal aortic aneurysm (AAA). The system consists of a self-expanding cobalt chromium alloy stent cage covered with expanded polytetrafluoroethylene (ePTFE) surgical graft material. The POWERLINK system is implanted in the abdominal aorta to direct blood flow away from the weakened section of the aorta, thereby reducing pressure and the potential for the aorta to rupture. In order to accommodate variations in patient anatomies, Endologix's POWERLINK system is available with multiple aortic cuffs, limb extensions, and infrarenal and suprarenal bifurcated main body lengths. It sells POWERLINK systems to customers mainly in the US, Latin America, Europe and Japan.

SAMPLE PROFILE

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"Led by contraceptive and hormone replacement applications, demand for implantable drug inserts is forecast to increase over eleven percent annually to \$360 million in 2014. Advances in alternative drug delivery systems, such as controlled-release oral formulations and transdermal patches, will moderate even faster gains. Generally, the number of pharmaceuticals offering safety and efficacy advantages in insert formats will remain limited."
 --Section VI, pg. 229

OTHER STUDIES

World In Vitro Diagnostics

This study analyzes the global *in vitro* diagnostic (IVD) product industry. It presents historical demand data (1999, 2004, 2009) and forecasts for 2014 and 2019 by IVD product (e.g., reagents and consumables, instruments and systems), application (e.g., clinical chemistry, immunodiagnostic, nucleic acid, hematology, microbiology, cellular analysis), world region and for 14 countries. The study also considers market environment factors, evaluates company market share and profiles industry participants.

#2724 February 2011 \$6100

Cosmetic Surgery Products

US demand for cosmetic surgery products is expected to advance 7.4% annually through 2014, based on a return to growth in cosmetic procedures. Injectables will remain the largest and fastest growing segment, led by BOTOX COSMETIC, DYSPORT and newer types such as calcium hydroxylapatite. This study analyzes the \$1.8 billion US cosmetic surgery product industry, with forecasts for 2014 and 2019 by procedure, product and raw material. It also evaluates company market share and profiles industry participants.

#2712 December 2010 \$4800

World Disposable Medical Supplies

Global demand for disposable medical supplies will increase 5.6% annually through 2014, with developed countries accounting for nearly three-fourths of the market. Wound management supplies will remain the top-selling group while diagnostic and laboratory disposables grow the fastest. This study analyzes the \$125 billion world disposable medical supply industry, with forecasts for 2014 and 2019 by product, world region and for 14 countries. It also evaluates company market share and profiles industry competitors.

#2691 December 2010 \$5900

Nanotechnology in Health Care

US demand for nanosized medical products will grow 17.1% yearly through 2014. Cancer and central nervous system disorders will be the fastest growing applications. Nanomedicines will provide the best opportunities, while nanotech medical supplies and devices grow the fastest from a small base. This study analyzes the \$34.2 billion US nanotechnology medical product industry, with forecasts for 2014 and 2019 by product and application. It also evaluates company market share and profiles industry participants.

#2622 June 2010 \$4800

World Wound Management Products

Global wound management product demand will rise 4.6% yearly through 2013. Best growth prospects include tissue sealants, foam and alginate wound dressings, growth factors, bioengineered tissue substitutes and anti-adhesion agents. China will be the fastest growing market, while the US remains the largest. This study analyzes the global market for wound management products, with forecasts for 2013 and 2018 by type, world region and for 13 countries. It also evaluates company market share and profiles industry players.

#2578 February 2010 \$5800

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