

# Implantable Medical Devices

## US Industry Study with Forecasts for 2020 & 2025

Study #3465 | November 2016 | \$5200



Medical implant sales in the US are driven by a growing prevalence of chronic orthopedic, cardiovascular, neurological, ophthalmic, hearing loss, and various other conditions that are not responsive to pharmaceutical or less invasive surgical therapies.

### Lifestyles affect sales growth

A rising incidence of injuries attributable to the expansion of sports activities, the increasing adoption of exercise-active lifestyles, and the high vulnerability of elderly individuals to falls and other accidents will broaden revenue opportunities for bone substitutes, tissue implants, and internal fixation devices employed in spinal fusion, trauma treatment, and fracture repair. Demand for the orthobiologic hyaluronic acid will advance at a fast pace based on widening use in osteoarthritis therapy and cosmetic surgery. Lastly, demand for dental implants will see sizeable gains as the prevalence of serious tooth and gum diseases in the aging population rises and the availability of affordable dental insurance improves.

### Orthopedics to remain top-selling group

Orthopedic products will remain the top-selling group of medical implants, with total demand advancing over five percent annually. A combination of demographic, lifestyle, and epidemiological trends will promote growth. The aging of the population will boost the prevalence of degenerative musculoskeletal conditions often requiring reconstructive joint replacement and/or spinal surgery.

### Cardiac implants will generate growth

The second-largest selling group of medical implants treats or manages various types of heart disease. Revenues generated by cardiac implants will be spread fairly evenly among three major product lines -- pacing devices, cardiac stents and related implants, and structural cardiac implants. Structural cardiac implants will generate the fastest growth in demand value due to upward trends in the prevalence of valvular heart disease and the increasing use of high value-added tissue-based replacement valves. By contrast, sales of pacing devices will grow slowly as advances in pharmaceuticals and surgical therapies eliminate the need for implants in some patients afflicted with heart rhythm disorders. Lastly, a heightened level of coronary and peripheral artery diseases will boost the market for cardiac stents and related products.

### Study coverage

This study analyzes the US implantable medical device market. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) for orthopedic (e.g., reconstructive joint replacements, spinal implants, orthobiologics), cardiac (e.g., stents and related implants, pacing devices) and other medical implants (e.g., gastroenterologicals, urologicals, cosmetics). The study also details key market environment factors, examines the industry structure, and assesses company market share data.

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Endovascular Stent-Grafts

Renal & Related Stents

Femoral & Related Stents

Carotid Stents

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### CARDIAC & OTHER MEDICAL IMPLANTS

**Cardiac Resynchronization Therapy Devices** -- US demand for cardiac resynchronization therapy (CRT-D) is expected to increase by 10 percent annually to \$1.5 billion by 2025. Increasing use in the elderly population is driving gains. Advances in CRT-D (ivabradine) and ENI (ivabradine) and ENI (ivabradine) are driving faster growth in demand.

The CRT-D was introduced in 2001. The device is the size of a pocket watch. It weighs 100 grams and is implanted in the upper chest area where it monitors the heart rate. Through attached leads, CRT-Ds transmit low level electrical impulses to the heart muscle, effectively resynchronizing contractions of the ventricles. This action improves the heart's ability to pump blood through the body and alleviates the symptoms of congestive heart failure. In the treatment and management of CHF, a CRT-D is used as a complement to drug therapy and lifestyle adjustments.

Congestive heart failure afflicts an estimated 5.7 million individuals in the US, and directly causes approximately 62,000 deaths each year. The condition is responsible for more than one million hospital admissions annually. Historically, the vast majority of patients with congestive heart failure died within eight years of its initial diagnosis. The availability of CRT-Ds is improving the effectiveness of therapy for this form of heart disease.

CRT-Ds are available in two models: a CRT pacemaker and a combination CRT pacemaker with defibrillation therapy. Both devices are used to coordinate the heart's pumping action and improve blood flow. They also speed up a heart that's beating too slowly. The CRT pacemaker has

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SAMPLE  
TEXT

TABLE IV-6

### PACING ACCESSORIES DEMAND BY PRODUCT GROUP (million dollars)

Item	2005	2010	2015	2020	2025
Pacing Devices Demand (000) pacing accessories/device					
Pacing Accessories Demand (000 units)					
Pacing Leads					
Pacing Batteries					
Pacing Leads (000\$/unit)					
Pacing Batteries (\$/unit)					
Pacing Accessories Demand					
Pacing Leads:					
ICD Leads					
ICP Leads					
CRT-D Leads					
Pacing Batteries					
% pacing accessories					
Pacing Device Demand					

SAMPLE  
TABLE

Source: The Freedonia Group

TABLE III-6

### SPINAL IMPLANTS DEMAND BY PRODUCT GROUP (million dollars)

Item	2005	2010	2015	2020	2025
Spinal Fusion Procedures (000) \$ implants/procedure					
Spinal Implants Demand					
Thoracolumbar Implants					
Cervical Implants					
Intervertebral Spacers					
Motion Preservation Devices					
Implantable Spinal Stimulators					
% spinal implants					
Orthopedic Implants Demand					

SAMPLE  
TABLE

Source: The Freedonia Group

## This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

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## Related Studies

### Medical & Dental Adhesives & Sealants

Demand for medical and dental adhesives and sealants in the US is forecast to rise 5.1 percent annually to \$2.1 billion in 2019, driven mainly by an aging population. Internal medical uses will remain the dominant and fastest growing application. The larger natural product segment will continue to outpace synthetic types. This study analyzes the \$1.7 billion US market for medical adhesives and sealants, with forecasts for 2019 and 2024 by product, application, and market. The study also evaluates company market share and profiles industry competitors.

#3390..... March 2016..... \$5200

### Disposable Medical Supplies

US demand for disposable medical supplies will rise 4.2 percent annually to \$54.1 billion in 2020. Drug delivery products will remain the largest and fastest growing type, led by safety-enhanced devices for minimally invasive delivery of parenteral and inhalation medicines, and IV solutions. Home healthcare will remain the fastest growing market. This study analyzes the \$44.1 billion US disposable medical supply industry, with forecasts for 2020 and 2025 by product and market. The study also evaluates company market share and profiles industry players.

#3378..... February 2016 ..... \$5500

### Dental Products & Materials

US demand for dental products and materials will rise 3.4 percent yearly to \$12.7 billion in 2019. Cosmetic and repair/restorative products will be the fastest growing professional products. Among consumer products, value-added formulations will drive the dominant toothpaste segment. Polymers, ceramics and minerals will lead gains in dental materials. This study analyzes the \$10.7 billion US dental product and material industry, with forecasts for 2019 and 2024 by product and raw material. The study also details company market share and profiles key companies.

#3359..... January 2016 ..... \$5200

### Medical Imaging Products

US demand for medical imaging products will rise 5.8 percent yearly to \$31.9 billion in 2019. Computed tomography (CT) and magnetic resonance imaging (MRI) products will lead gains, followed by nuclear medicine products. Good prospects also exist for picture archiving and communications systems (PACS) as patient data networks are upgraded. This study analyzes the \$24.1 billion US medical imaging industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share and profiles industry participants.

#3315..... September 2015..... \$5300

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## Freedonia's methods

- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

## About The Freedonia Group

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