

Soft Tissue Allografts Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The Global Soft Tissue Allografts Market is expected to witness a CAGR of 6.75% during the study period.

The outbreak of COVID-19 resulted in decreased public mobility and significantly impacted the therapeutic and surgical procedures, as the surgical procedures that are non-immediate and are being postponed to decrease the burden on healthcare infrastructure. With the emergence of COVID-19, surgical procedures were kept on hold in order to prevent the spread of the COVID-19 virus. There is tremendous pressure on the hospitals and other healthcare centers in providing services to COVID-19 patients is also one of the factors that are inhibiting the hospitals in providing services.

The rising demand for soft tissue allografts in athletics and other sports is contributing largely to the market growth. Modern training regimens in athletics, field events, and a number of other contact sports like American football require athletes to undergo intensive training sessions, which are in practice more strenuous than the actual sport itself. High-intensity training regimens are directly correlated with athletic performance improvement, but excessive training also induces muscle and bone fatigue and often leads to injury. Consequently, injury prevalence among athletes has been increasing, especially due to excessive training. The competitive nature of sports has spurred the demand among athletes for quick recovery and easily accessible modalities to treat musculoskeletal injuries.

Osteoarthritis has a considerable impact on the individual patient, resulting in pain and disability, and the increasing prevalence of this disease is expected to boost the market in the near future. For instance, as per the 2020 statistics by the United Kingdom National Health Service, tennis elbow was a common condition affecting about 1-3% of the population, indicating about 4 to 7 cases per 1,000 every year. The soft tissue market finds its grip behind technology development. While many companies in the market would like to release products that help market growth, awareness and growth in learning levels about these products will

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also play a big role. The level of awareness among the public, especially with the increase in internet access and easy access to social media, has increased. Over time, the soft tissue market will benefit from growing knowledge about products and processes.

According to the study "Use of Allografts in Orthopaedic Surgery: Safety, Procurement, Storage, and Outcomes," published in December 2019, fresh osteochondral allografts, fresh-frozen meniscal allografts, soft tissue allografts, and off-the-shelf cartilage products were the common allograft safety and tissue bank practices in the United States. Thus, the studies proving the efficacies of soft tissue allografts are expected to propel market growth.

Thus, demand for soft tissue allografts has been increasing in athletics and other contact sports, which in turn is fuelling the growth of the global soft tissue allografts market. However, the high cost of treatment and complicated reimbursement and regulatory policies are expected to hinder the market growth.

Soft Tissue Allografts Market Trends

Cartilage Allograft is Expected to Hold Significant Market Share Over the Forecast Period

Cartilage allografts are the vital components in orthopedic surgical procedures such as joint reconstruction etc. Cartilage graft transplantation is frequently used in the treatment of chondral and osteochondral lesions, most commonly in the knee. These procedures can serve to improve the quality of life for those with the pathology of the cartilage within joints and alleviate symptoms. The scientific basis of Osteochondral allograft (OCA) is the transplantation of fully developed or mature hyaline (joint) cartilage containing living cartilage cells ('chondrocytes') that survive the transplant and support the production of the cartilage matrix indefinitely.

Osteochondral allograft (OCA) transplantation is a versatile treatment option for patients with cartilage and osteochondral defects. For instance, according to a study "Osteochondral Allograft Transplant for Focal Cartilage Defects of the Femoral Condyles: Clinically Significant Outcomes, Failures, and Survival at a Minimum 5-Year Follow-up," osteochondral transplant demonstrates significant clinical improvement and durability at mid-to-long-term follow-up, with 5 and 10-year survival rates of 86.2% and 81.8%, respectively. Thus, the increased efficacy of OCA will drive the segmental growth.

Arthrex Inc. is one of the most renowned companies involved in the development of cartilage allografts. The company's portfolio includes several cartilage allografts, namely Arthrex Meniscal Allograft Arthroplasty and Small Joint OATS (Osteochondral Autograft Transfer System). Moreover, the launch of new products is also expected to drive market growth. For instance, in March 2019, MTF Biologics launched a putty-like cartilage allograft, CartiMax Viable Cartilage Allograft, designed to easily fill lesions in the knee, foot, and ankle.

Thus, owing to the aforementioned factors, the market for the cartilage allografts segment is expected to grow significantly during the forecast period.

North America is Expected to Dominate the Market Over the Forecast Period

In North America, the market growth is majorly driven by factors such as the increasing prevalence of diabetic foot ulcers, better healthcare awareness programs for diabetes, and an increasing number of surgical procedures on anterior cruciate ligament (ACL).

During the COVID-19 pandemic in 2020, in the North American region, the specialty clinics, including dental practices and hospitals, were shut down or their operations were limited, and some hospitals were converted to containment facilities and treatment wards for COVID-19 patients. For instance, in March 2020, in the United States, the National Association for the

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Advancement of Orthotics and Prosthetics (NAAOP) issued an alert that state and local health authorities should consider orthotic and prosthetic practices as essential providers that must remain accessible to patients in need of the same.

The launch of new products in the region is expected to drive market growth. For instance, in December 2020, the United States Food and Drug Administration received marketing authorization for an anterior cruciate ligament (ACL) implant, intended to serve as an alternative to ACL reconstruction to treat ACL tears. This device is used to reconstruct with allograft, autograft, or suture-only repair for the treatment of ACL rupture.

Also, according to the Canadian Institute for Health Information 2020 report, the number of Canadians with joint replacements had increased over the past five years, with 138,000 surgeries being performed annually. There were almost 63,000 hip replacements, and 75,000 knee replacements were performed in Canada in 2019-2020. Thus, the high instances of hip and knee replacements in Canada are expected to drive the soft tissue allografts market as they are used in these surgeries. Therefore, the rising burden of diseases is creating tremendous opportunities for market players, and they are focusing on R&D activities in order to bring new and reliable products into the market, thus, driving the market growth. For instance, in February 2020, Integra LifeSciences Holding Corporation launched AmnioExcel Plus Placental Allograft Membrane, the latest wound care offering to support soft tissue repair.

Thus, owing to the aforementioned factors, the market is expected to witness a high growth rate over the forecast period.

Soft Tissue Allografts Market Competitor Analysis

The soft tissue allografts market is moderately competitive, and many global players are present in the market. Some of the market players include Abbvie Inc. (Allergan), Conmed Corporation, Becton Dickinson and Company, Smith & Nephew (Osiris Therapeutics Inc.), Integra LifeSciences Corporation, Stryker Corporation, Zimmer Biomet, Arthrex Inc., and Direct Biologics. Also, new product launches from these players are augmenting the demand for these products.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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