

Osteonecrosis Treatment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The osteonecrosis treatment market is expected to register a CAGR of 6.2% during the forecast period.

The COVID-19 pandemic had a significant impact on the studied market, as osteonecrosis or avascular necrosis was a very common complication that was found in COVID-19 patients. Thus, the rising COVID-19 cases during the early pandemic also increased osteonecrosis cases among patients.

For instance, According to an article published by MDPI in November 2021, avascular necrosis (AVN) is a known complication after steroid treatment of severe COVID-19 infections or long-term COVID-19 infections. AVN can also develop shortly after a COVID-19 infection without prior steroid treatment. Apparently, COVID-19 infection alone may represent a risk factor for developing AVN, and it is estimated that, on average, AVN begins 2 weeks after COVID-19 onset in contrast to long COVID-19 late-onset AVN. Thus, the pandemic had a significant impact on market growth. However, as the pandemic has subsided, COVID-19-osteonecrosis cases have started to decrease, so the studied market is expected to have stable growth due to the high burden of the disease due to various other factors during the forecast period of the study.

The rise in the geriatric population increases the incidence of osteonecrosis worldwide. The growing demand for non-invasive treatment and technological advancements for a better treatment for osteonecrosis are the key driving factors in the osteonecrosis treatment market.

Old age is often associated with the increasing prevalence of osteonecrosis. For instance, according to an article updated by NCBI in November 2022, SONK (Spontaneous Osteonecrosis of the Knee) is more common in older persons, and a unicompartmental knee replacement provides a good functional outcome with a relatively short rehabilitation time. Moreover, according to the data

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published by WHO in October 2022, it is estimated that 1 in 6 people in the world will be aged 60 years or over by 2030, and the share of the population aged 60 years and over will increase to 1.4 billion by 2030. Thus, the rising geriatric population is expected to increase the demand for osteonecrosis treatment products.

Moreover, the development of various non-invasive tools for the treatment of osteonecrosis is expected to enhance the growth of the market. For instance, according to an article published by PubMed Central in September 2022, medication-related osteonecrosis of the jaw (MRONJ) is considered a serious adverse reaction, mainly due to bone-modifying agents (BMA), and for patients with advanced disease stages who are unsuitable for surgery, prolonged medical treatment is required, which comes with a consequent risk of the overuse of antibiotics and antibiotic resistance.

The abovementioned article also stated that ozone injections could be an innovative, powerful, and effective non-invasive tool for nonoperative MRONJ treatments, especially when operative (invasive) procedures could be an additional burden for complicated cases and medical challenges. Thus, the development of non-invasive techniques, such as ozone injections, is expected to boost the market growth.

Additionally, various developments by market players are also expected to enhance market growth. For instance, in April 2022, Genexa launched a clean acetaminophen pain relief product for adults. Acetaminophen is often used for the treatment of osteonecrosis.

Hence, due to the aforementioned factors, such as the rising geriatric population and the rising development of non-invasive treatment options, the market is expected to experience growth during the forecast period of the study. However, adverse side effects associated with osteonecrosis treatment are expected to impede market growth.

Osteonecrosis Treatment Market Trends

The Bone Replacement Devices/Implants Segment is Expected to Hold a Significant Market Share in the Osteonecrosis Treatment Market

The bone transplant (graft) procedure can help strengthen the area of bone affected by avascular necrosis, and the graft used is a section of healthy bone taken from another part of the body. Joint replacement surgery is also performed if the affected bone has collapsed or other treatments aren't helping. Surgery can replace the damaged parts of the joint with plastic or metal parts. The increasing advantages of bone replacement surgeries are a major factor driving the growth of the market. The rising geriatric population associated with the increasing prevalence of osteonecrosis is also increasing bone replacement procedures.

According to an article updated by NCBI in November 2022, many patients with hip osteonecrosis will ultimately need a total hip arthroplasty as non-invasive procedures and medications prove to be ineffective. The article also stated that total hip arthroplasty is indicated for hip osteonecrosis when patients are older than 40 years and have large lesions or are young with more advanced femoral head collapse and degenerated acetabulum. Cementless prosthesis for both the femur and acetabulum is predominantly used, and outcomes are usually good in terms of pain reduction and functional improvement. Thus, the advantages offered by bone replacement procedures are expected to boost segment growth.

Moreover, according to the United Nations World Population Prospects 2022, it is estimated that 10% of the global population will be aged 65 years or older in 2022, and this is expected to rise to 16% by 2050. As older people are more likely to adopt bone replacement procedures, the rising geriatric population is expected to enhance the growth of the segment.

Thus, due to the aforementioned factors, such as the rising geriatric population and the advantages offered by bone replacement procedures, the studied segment is expected to experience growth during the forecast period of the study.

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North America is Expected to Hold a Significant Share in the Market during the Forecast Period

North America is expected to hold a significant market share in the osteonecrosis treatment market due to an increase in the geriatric population and growing awareness among people about the diagnosis of the disease in this region. For instance, according to the data published by Statistics Canada in July 2022, it is estimated that around 7,330,605 people were aged 65 years or older in Canada in 2022; this accounts for 18.8% of the total population, and around 2,573,624 people were aged 40 to 44 in Canada.

Furthermore, the high prevalence of osteonecrosis in the region is also expected to enhance market growth. For instance, according to an article updated by NCBI in November 2022, it has been estimated that ten percent of total hip arthroplasties in the United States are due to avascular necrosis or osteonecrosis, and it typically affects ages 30 to 65 years old. Moreover, the rising geriatric population in the United States is also expected to significantly increase the market growth. For instance, according to the United Nations Population Fund 2022 dashboard, it is estimated that 17% of people are 65 years and older in the United States in 2022.

Additionally, various developments by market players are also expected to enhance market growth. For instance, in June 2022, Strides Pharma received the United States FDA (USFDA) approval for ibuprofen OTC oral suspension 50mg/1.25mL. Ibuprofen is an NSAID that is often used for the treatment of osteonecrosis.

Thus, due to the aforementioned factors, such as the rising geriatric population and the rising prevalence of osteonecrosis, the studied market is expected to experience growth in the region during the forecast period of the study.

Osteonecrosis Treatment Industry Overview

The osteonecrosis treatment market is moderately fragmented and consists of several major players. The market players are focusing on research and development for development of new products. Some of the leading companies operating in the market include Novartis AG, Pfizer Inc., Teva Pharmaceutical Industries Ltd, Viatris Inc., Zimmer Biomet, Merck & Co. Inc., Enzo Biochem Inc., Atnahs, Bone Therapeutics SA, and Vericel Corporation, among others.

Additional Benefits:

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

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