

Orthobiologics Market Assessment, By Product [Demineralized Bone Matrix, Viscosupplements, Synthetic Bone Substitutes, Allografts, Bone Growth Factors, Others], By Application [Reconstructive and Fracture Surgery, Osteoarthritis and Degenerative Arthritis, Spinal Fusion, Soft Tissue Repair, Maxillofacial and Dental, Others], By End-user [Hospitals, Ambulatory and Trauma Care Centers, Orthopedic Clinics, Dental Clinics and Facilities, Others], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global orthobiologics market is projected to witness a CAGR of 6.08% during the forecast period 2024-2031, growing from USD 7.01 billion in 2023 to USD 11.24 billion in 2031. The global orthobiologics market is mostly driven by technological improvements. Orthobiologic solutions are now more widely available, thanks to advancements in medical technology, including improved biomaterials and surgical methods. The ability to treat bone and joint problems more effectively is being made possible by this advancement, which makes orthobiologic choices more appealing to patients and physicians alike.

The global orthobiologics market is expanding due to the ageing of the world's population. People who live longer are more likely to experience age-related orthopedic problems like osteoporosis and arthritis. The need for orthobiologic therapies, which are frequently utilized to accelerate the healing process for fractures and degenerative diseases that are widespread among the elderly, is increased by this shift in demography.

The global orthobiologics market is growing due to an increase in orthopedic problems across all age categories, including younger and more active people. An increasing number of patients require orthobiologic therapy due to the rise in

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musculoskeletal problems and sports-related injuries linked to lifestyle choices.

Furthermore, the dynamics of the global orthobiologics market is influenced by the growing desire for less intrusive surgical solutions. Orthobiologics are frequently utilized in minimally invasive operations; its benefits include shortened recovery times, a lower chance of infection, and decreased postoperative pain. Orthobiologic products are being more widely used in operations, particularly sports medicine surgical procedures, because of the shift towards less intrusive techniques.

Tetrou, Inc., for example, announced in July 2023 the issuance of a U.S. patent for Enfix(TM) Demineralized Bone Fibre Implants for use in sports medicine surgical operations. The first product in the EnFix family, EnFix RC, is an implant designed specifically for rotator cuff repair procedures. Australia and the United States are the only countries where it is now accessible.

Surge in Orthopedic Disorders Boosting the Market

The global orthobiologics market is growing rapidly due to the rising prevalence of orthopedic disorders worldwide. More people are experiencing conditions, including osteoporosis, arthritis, and spinal problems, which increases the demand for efficient treatment solutions. By encouraging bone repair and regeneration, orthobiologics is critical in treating these conditions. The need for these therapies is further increased by the rise in musculoskeletal issues and sports injuries brought on by contemporary lifestyles. The global orthobiologics market is expanding because of the rise in health concerns, which, in turn, is driving research and development efforts to produce more sophisticated and efficacious solutions for various orthopedic problems.

According to a recent study published in 'The Lancet Rheumatology' journal, there will be a 115 percent increase in problems of the joints, muscles, and bones during the next thirty years. By 2050, more than a billion people worldwide will likely be suffering from illnesses of the muscles, bones, joints, ligaments, tendons, and spine-a number that has increased from roughly half a billion in 2020. The impact of the Covid pandemic on our musculoskeletal system may play a significant role in these predictions.

Technological Advancements Fueling the Market

Technological advancements play a major role in the growth of the global orthobiologics market, particularly in the form of new and more effective products and treatment methods. Treatments for problems with the bones and joints are now more successful because of developments in biomaterials and biological therapies. For instance, improvements in tissue engineering and regenerative medicine have raised the calibre of scaffolds and bone transplants that are essential for orthopedic procedures.

Advances in 3D printing technology also allow for customized orthopedic devices and implants, made to fit each patient's unique needs. In addition to improving patient outcomes, these technological advancements broaden the range of illnesses that can be treated, which grows the global orthobiologics market.

For instance, leading medical technology business, Xenco Medical showcased its TrabeculeX Continuum at the 2024 Consumer Electronics Show in Las Vegas, Nevada, on January 11th, showing its convergent technology that bridges biomaterials and digital health. The TrabeculeX Continuum, which integrates the TrabeculeX Bioactive Matrix and the TrabeculeX Recovery App, is the first technologically enabled link between digital health and orthobiologics, streamlining a patient's postoperative course and biomaterial implantation.

Growing Demand for Orthobiologics in Spinal Fusion Surgeries

Orthopedics use in spinal fusion procedures is a major driver of the global orthobiologics market. In joining two or more spinal vertebrae, orthobiologic materials, such as demineralized bone matrices, bone transplants, and bone morphogenetic proteins, play a critical role in spinal fusion. They lead to better patient outcomes and healing by dramatically improving the bone development and healing required for a successful fusion. The number of spinal fusion operations rises because of the rising incidence of spinal diseases, which are linked to factors including an aging population and unproductive lifestyles. The increase in surgeries is driving the demand for orthobiologic products, which, in turn, is propelling the growth and development of the global orthobiologics market.

For example, the UK-based orthobiologics company Locate Bio announced in May 2023 that LDGraft had received a breakthrough product classification from the US Food and Drug Administration (FDA). LDGraft is developed for anterior lumbar interbody spinal fusion (ALIF) procedures conducted at one level, from L3 to S1, for patients with degenerative disc disease.

The Growing Popularity of Demineralized Bone Matrix

The global orthobiologics market is growing due to the escalating demand for demineralized bone matrix (DBM). DBM is becoming increasingly well-liked because it works well for various orthopedic procedures, including spinal fusion, bone fractures, and joint reconstructions. DBM is a processed type of allograft bone that keeps growth factors essential for bone regeneration. DBM is

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becoming more popular due to its ability to stimulate bone growth and to work well with other grafts to enhance results. Thus, the growing demand for DBM in orthopedic surgeries is a major driver for the growth of the global orthobiologics market and illustrates the changing landscape of surgical bone healing techniques.

For instance, the full market release and initial implant of Legacy Demineralized Bone Matrix (DBM), a putty for repairing spaces or gaps in bony defects or traumatic injuries of the spine, pelvis, or extremities, were announced in October 2022 by Orthofix Medical Inc., a multinational medical device company with a focus on spine and orthopedics.

North America Dominates the Market

Numerous important variables are responsible for North America's dominant position in the global orthobiologics market. The area is home to a state-of-the-art healthcare system that stimulates substantial medical research and development, particularly in orthopedics. When combined with a significant investment in healthcare and a dedication to innovation, these features improve its position in the market. Orthobiologic treatments are highly needed due to the high prevalence of orthopedic disorders in North America, which are caused by an ageing population, increasing obesity rates, and lifestyle-related musculoskeletal problems. The strict regulatory environment in the area also guarantees the supply of safe and high-quality orthobiologic products, which propels the growth of the global orthobiologics market.

For example, in August 2022, CGBio, a firm that develops novel synthetic bone grafts, and Orthofix Medical Inc., a multinational medical device company focused on spine and orthopedics, signed a strategic cooperation arrangement. The two businesses collaborated to develop Novosis's recombinant human bone morphogenetic protein-2 (rhBMP-2) bone growth materials. They also aim to create other tissue regenerative solutions for the American and Canadian markets.

Future Market Scenario (2024 - 2031F)

□□The global orthobiologics market is poised for growth, influenced by the aging global population, a rise in orthopedic conditions, and breakthroughs in orthobiologic technologies.

□□The future of the global orthobiologics market is expected to be shaped by continuous research and development efforts, paving the way for the introduction of innovative and more efficient orthobiologic solutions, including cutting-edge biomaterials and regenerative medicine.

□□With the improvement of healthcare systems in emerging countries, the adoption of orthobiologic treatments in these areas is expected to rise, significantly contributing to the market's expansion.

□□Potential changes in government regulations and health insurance reimbursement policies could significantly influence the market, impacting the usage and accessibility of orthobiologic treatments and products.

Key Players Landscape and Outlook

One of the key factors driving the growth of the global orthobiologics market is the current noteworthy rise in mergers and acquisitions (M&A). Larger organisations are acquiring smaller or equivalent businesses through M&A transactions in order to expand their product offerings, break into new markets, and gain access to cutting-edge research and technology. Companies can increase their competitive edge, boost market presence, and achieve cost efficiency through these strategic consolidations. Furthermore, the combination of information and resources encourages creativity, which produces better orthobiologic products. Therefore, M&A activity plays a crucial role in shaping the market environment and promoting a more diverse and technologically advanced orthobiologics industry.

For example, in November 2023, Berkeley Biologics-a fully owned subsidiary of GNI Group-completed the acquisition of Elutia's Orthobiologics business unit for up to \$35 million in cash. At closing, Elutia received a \$15 million upfront payment, with additional earnout payments of up to \$20 million possible over the next five years. Through the acquisition, Elutia hopes to give doctors access to the potency of targeted therapies, along with the advantages of natural biological materials for wound healing.

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