

**Orthopedic Devices Market by Product (Fixation, Replacement, Prosthetics, Spinal Implant, Brace, Orthobiologics (DBM), Bone Graft), Procedures Volume (Knee, Hip, Ankle, Shoulder) Site, Application, End User (Hospital, ASC, Trauma) - Global Forecast to 2030**

Market Report | 2025-03-06 | 441 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$12000.00
- Multi User \$14000.00
- Corporate License \$16000.00
- Enterprise Site License \$21000.00

**Report description:**

The global orthopedic devices market is expected to reach 68.51 billion by 2030 from USD 51.61 billion in 2024, at a CAGR of 4.8% from 2024 to 2030. The orthopedic devices market is growing due to increasing cases of musculoskeletal disorders, increasing geriatric population, and rising demand for minimally invasive surgical techniques. Osteoarthritis, rheumatoid arthritis, and osteoporosis are increasingly prevalent, especially among the elderly, and are increasing the need for joint replacement and fracture fixation equipment. Adoption of 3D printing, robotic-assisted surgery, and bioresorbable & smart implants, are improving patient outcomes. Osteoarthritis, rheumatoid arthritis, and osteoporosis are highly prevalent, especially among the elderly, and are driving demand for joint replacement and fracture fixation devices.

"The joint replacement devices segment to hold the largest share of the market in 2023."

Joint replacement devices are devices implanted to substitute diseased or damaged joints, mainly in the hip, knee, and shoulder, to decrease pain and enhance movement. They are driven by increasing obesity, which results in joint decay, and by more young people requiring early intervention. Technologies such as real-time tracking smart implants and personalized 3D-printed implants are improving surgical precision and patient recovery. Additionally, an increase in healthcare expenditure, supportive reimbursement policies, and government strategies enhance orthopedic care.

"The knee & thigh segment to hold the largest share of the market in 2023."

The knee & thigh segment accounts for the largest share of the orthopedic devices market by site due to the high incidence of

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

fractures in knee, osteoarthritis, and osteoporosis. Knee replacement surgeries are the most common orthopedic procedures conducted, fueled by rising life expectancy and the increasing number of populations affected with degenerative joint diseases. Moreover, innovations in implant materials, minimally invasive surgical procedures, and robotic-assisted surgeries have improved the quality of life of patients. The increasing prevalence of sports injuries also drives the requirement for knee & thigh implants.

"The hospitals and surgical centers segment to hold the largest share of the market in 2023."

The segment of hospitals and surgical centers has the highest market share in orthopedic devices because they play a pivotal role in delivering high-end and specialized treatments for orthopedic conditions in patients. They provide technologically advanced orthopedic procedures, such as joint replacements and fracture fixations, which make them the first choices for orthopedic procedures. Also, hospitals and surgery centers usually possess the necessary funds to manage complicated cases, conduct minimally invasive procedures, and administer post-procedure treatment, all of which sustain demand for orthopedic devices.

"The market in the APAC region is expected to register the highest growth rate for orthopedic devices in 2023."

The orthopedic devices market covers five key geographies-North America, Europe, Asia Pacific, Latin America, and the Middle East and Africa. In 2023, a significant market share for orthopedic devices was held by the market in the North American region, comprising the US and Canada. On the other hand, the Asia Pacific market is estimated to register the highest growth rate during the forecast period.

The Asia Pacific is experiencing the most rapid growth in the market for orthopedic devices due to a combination of factors such as a rapidly growing elderly population, increased disposable incomes, and growth in access to healthcare. The growth in musculoskeletal disorders such as arthritis and osteoporosis, particularly in countries such as Japan, China, and India, is driving the adoption of orthopedic treatments. Furthermore, the region is also experiencing a boost in health care infrastructure as well as new-age technology applications, such as minimally invasive procedures and robotic-assisted surgeries, that are improving surgical outcomes. Additionally, rising medical tourism in countries such as India and Thailand, along with government actions to enhance the health care infrastructure, is also contributing to growth in the market in the region.

A breakdown of the primary participants referred to for this report is provided below:

-□By Company Type: Tier 1- 30%, Tier 2- 42%, and Tier 3- 28%

-□By Designation: Directors- 10%, Managers- 14%, and Others- 76%

-□By Region: North America- 40%, Europe- 30%, Asia Pacific- 22%, Latin America- 6%, MEA- 2%

The prominent players in the Orthopedic devices market are Stryker Corporation (United States), Johnson & Johnson (United States), Globus Medical, Inc. (United States), Medacta International SA (Switzerland), Zimmer Biomet Holdings, Inc. (United States), Arthrex, Inc. (United States), Acumed LLC (United States), Enovis Corporation (United States), CONMED Corporation (United States), B. Braun Melsungen AG (Germany), Meril Life Sciences Pvt. Ltd. (India), (Ireland), Paragon 28, Inc. (United States), Smith & Nephew plc (United Kingdom), Orthofix Medical Inc. (United States).

#### Research Coverage

This market research report analyzes the orthopedic devices market along several different segments, such as product type, application, end-user, region, site and geography. The report further sheds light on market growth-driving factors, mentions opportunities and threats, and presents analysis of competitive rivalry of leading companies. It further studies micro markets by focusing on growth tendencies and predicts revenues for industry segments for five leading geographies, along with corresponding countries.

#### Reasons to Buy the Report

The report would assist both small and new businesses in comprehending the market pattern, which can help them grow their market place. Businesses procuring the report can implement any one or several of the approaches discussed to extend their market position.

This report provides insights on the following pointers:

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- Key drivers (increasing requirement for minimally invasive orthopedic surgical procedures and increasing number of sports injuries, increasing incidence of orthopedic diseases and disorders and increasing research funding and restraints (risk and complications of orthopedic surgical procedures, exorbitant cost of orthopedic treatments, reduced reimbursements for orthopedic surgical procedures), opportunities (increasing number of hospitals and trend towards outpatient care, innovations in robotic-assisted orthopedic surgeries and 3D printing), and challenges (skilled orthopedic surgeons shortages) fueling the market growth of orthopedic devices
- Product Development/Innovation: In-depth study of emerging technologies, research & development programs, and new product & service launches in the orthopedic devices market
- Market Growth: In-depth insights into remunerative markets report analyzes the orthopedic devices market across varied geographies.
- Market Diversification: Detailed analysis of new products, unexplored geographies, latest trends, and investments in the orthopedic devices market
- Competitive Analysis: In-depth analysis of market shares, growth strategies, and services of leading players, such as Zimmer Biomet Holdings, Inc. (US), Stryker Corporation (US), Johnson & Johnson MedTech (US), Smith+Nephew (UK), B. Braun (Germany).

**Table of Contents:**

- 1□INTRODUCTION□34
- 1.1□STUDY OBJECTIVES□34
- 1.2□MARKET DEFINITION□34
- 1.3□STUDY SCOPE□35
- 1.3.1□MARKETS CONSIDERED AND REGIONS COVERED□35
- 1.3.2□INCLUSIONS AND EXCLUSIONS□36
- 1.3.3□YEARS CONSIDERED□37
- 1.3.4□CURRENCY CONSIDERED□37
- 1.3.5□STAKEHOLDERS□37
- 1.4□SUMMARY OF CHANGES□38
- 2□RESEARCH METHODOLOGY□39
- 2.1□RESEARCH DATA□39
- 2.2□RESEARCH DESIGN□40
- 2.2.1□SECONDARY RESEARCH□40
- 2.2.1.1□Key data from secondary sources□42
- 2.2.2□PRIMARY RESEARCH□42
- 2.2.2.1□Primary sources□43
- 2.2.2.2□Key industry insights□44
- 2.3□MARKET SIZE ESTIMATION□45
- 2.3.1□BOTTOM-UP APPROACH□46
- 2.3.1.1□Approach 1: Company revenue estimation approach□47
- 2.3.1.2□Approach 2: Customer-based market estimation□47
- 2.3.1.3□Approach 3: Top-down approach□48
- 2.3.1.4□Approach 4: Primary interviews□48
- 2.4□GROWTH FORECAST□49
- 2.5□DATA TRIANGULATION AND MARKET BREAKDOWN□51
- 2.6□MARKET SHARE ASSESSMENT□52
- 2.7□RESEARCH ASSUMPTIONS & LIMITATIONS□52
- 2.7.1□ASSUMPTIONS□52
- 2.7.2□LIMITATIONS□53
- 2.8□RISK ASSESSMENT□53

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

3	EXECUTIVE SUMMARY	54
4	PREMIUM INSIGHTS	59
4.1	ORTHOPEDIC DEVICES MARKET OVERVIEW	59
4.2	NORTH AMERICA: ORTHOPEDIC DEVICES MARKET, BY PRODUCT	60
4.3	EUROPE: ORTHOPEDIC DEVICES MARKET, BY SITE	61
4.4	ASIA PACIFIC: ORTHOPEDIC DEVICES MARKET, BY END USER (USD MILLION)	62
4.5	ORTHOPEDIC DEVICES MARKET, BY REGION	62
5	MARKET OVERVIEW	63
5.1	INTRODUCTION	63
5.2	MARKET DYNAMICS	63
5.2.1	DRIVERS	64
5.2.1.1	Rising cases of orthopedic diseases and disorders	64
5.2.1.2	Increasing adoption of telemedicine and telesurgery	64
5.2.1.3	Increasing demand for minimally invasive orthopedic surgical procedures	65
5.2.1.4	Growing number of sports and accident-related orthopedic injuries	65
5.2.1.5	Rising geriatric population and projected increase in age-related bone disorders	65
5.2.2	RESTRAINTS	66
5.2.2.1	Risks and complications associated with orthopedic surgical procedures	66
5.2.2.2	High cost of orthopedic devices and treatments	66
5.2.3	OPPORTUNITIES	66
5.2.3.1	Growing focus on orthobiologics	66
5.2.3.2	Rising number of hospitals and shift toward outpatient care	67
5.2.3.3	Increasing use of robotics and 3D printing in orthopedics	67
5.2.4	CHALLENGES	68
5.2.4.1	Dearth of orthopedic surgeons	68
5.3	ECOSYSTEM ANALYSIS	69
5.4	SUPPLY CHAIN ANALYSIS	70
5.4.1	MANUFACTURERS	71
5.4.1.1	Prominent companies	71
5.4.1.2	Small and medium-sized enterprises	71
5.4.2	END USERS	71
5.5	VALUE CHAIN ANALYSIS	71
5.5.1	RESEARCH AND DEVELOPMENT	71
5.5.2	PROCUREMENT AND PRODUCT DEVELOPMENT	71
5.5.3	MARKETING, SALES AND DISTRIBUTION, AND POST-SALES SERVICES	72
5.6	TECHNOLOGY ANALYSIS	73
5.6.1	KEY TECHNOLOGIES	73
5.6.1.1	Robotic-assisted technology	73
5.6.2	COMPLEMENTARY TECHNOLOGIES	73
5.6.2.1	Imaging systems and software	73
5.6.2.2	Fluoroscopy	74
5.6.3	ADJACENT TECHNOLOGIES	74
5.6.3.1	AI and machine learning	74
5.7	KEY CONFERENCES AND EVENTS IN 2025-2026	75
5.8	TRADE ANALYSIS	76

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.8.1 IMPORT DATA FOR HS CODE 902110 76
- 5.8.2 EXPORT DATA FOR HS CODE 902110 77
- 5.9 PATENT ANALYSIS 79
- 5.10 TRENDS/DISRUPTIONS IMPACTING CUSTOMERS' BUSINESSES 81
- 5.11 PORTER'S FIVE FORCES ANALYSIS 81
  - 5.11.1 OVERVIEW 81
  - 5.11.2 THREAT OF NEW ENTRANTS 82
  - 5.11.3 THREAT OF SUBSTITUTES 82
  - 5.11.4 BARGAINING POWER OF SUPPLIERS 83
  - 5.11.5 BARGAINING POWER OF BUYERS 83
  - 5.11.6 INTENSITY OF COMPETITIVE RIVALRY 83
- 5.12 KEY STAKEHOLDERS AND BUYING CRITERIA 83
  - 5.12.1 KEY STAKEHOLDERS 83
  - 5.12.2 KEY BUYING CRITERIA 84
- 5.13 CASE STUDY ANALYSIS 85
  - 5.13.1 CASE STUDY 1: ANTERIOR CRUCIATE LIGAMENT RECONSTRUCTION AND CHONDROPLASTY OF KNEE 85
  - 5.13.2 CASE STUDY 2: EFFECTIVENESS OF OSTEOPATHY IN TREATING SPORTS INJURIES 86
  - 5.13.3 CASE STUDY 3: TOTAL HIP REPLACEMENT WITH AVASCULAR NECROSIS 87
- 5.14 PRICING ANALYSIS 87
  - 5.14.1 AVERAGE SELLING PRICE, BY REGION 88
  - 5.14.2 AVERAGE SELLING PRICE, BY KEY PLAYER 89
- 5.15 REIMBURSEMENT SCENARIO 89
- 5.16 INVESTMENT & FUNDING SCENARIO 91
- 5.17 UNMET NEEDS AND KEY PAIN POINTS 93
- 5.18 REGULATORY LANDSCAPE 93
  - 5.18.1 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS 93
  - 5.18.2 REGULATORY FRAMEWORK 96
    - 5.18.2.1 North America 96
      - 5.18.2.1.1 US 96
      - 5.18.2.1.2 Canada 97
    - 5.18.2.2 Europe 99
    - 5.18.2.3 Asia Pacific 100
      - 5.18.2.3.1 Japan 100
      - 5.18.2.3.2 China 101
      - 5.18.2.3.3 India 102
- 5.19 IMPACT OF AI ON ORTHOPEDIC DEVICES MARKET 103
- 5.20 ADVANCED PROSTHETICS 104
- 5.21 SMART IMPLANTS 104
- 6 ORTHOPEDIC DEVICES MARKET, BY PRODUCT 105
  - 6.1 INTRODUCTION 106
  - 6.2 ORTHOPEDIC REPLACEMENT DEVICES 107
    - 6.2.1 FOOT & ANKLE REPLACEMENT DEVICES 109
      - 6.2.1.1 Growing number of foot and ankle replacement procedures to fuel market growth 109
    - 6.2.2 KNEE REPLACEMENT DEVICES 110

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.2.2.1 Ongoing innovation in knee implants to support growth 110
- 6.2.3 HIP REPLACEMENT DEVICES 111
  - 6.2.3.1 Rising number of hip fractures and increasing success rate of hip arthroplasty to support market growth 111
- 6.2.4 HAND & WRIST REPLACEMENT DEVICES 112
  - 6.2.4.1 Rising demand to support market growth 112
- 6.2.5 ELBOW REPLACEMENT DEVICES 113
  - 6.2.5.1 Increasing frequency of elbow joint fractures and growth in elderly population to drive market 113
- 6.2.6 SHOULDER REPLACEMENT DEVICES 114
  - 6.2.6.1 Launch of new shoulder replacement implants and rising popularity of reverse shoulder arthroplasty to support growth 114
- 6.2.7 OTHER REPLACEMENT DEVICES 115
- 6.3 SPINAL IMPLANTS & SURGICAL DEVICES 115
  - 6.3.1 SPINAL FUSION DEVICES 118
    - 6.3.1.1 Advantages of anterior thoracic & anterior lumbar fusion to support market growth 118
  - 6.3.2 SPINAL NON-FUSION DEVICES 118
    - 6.3.2.1 Increasing incidence of degenerative diseases in younger populations to drive market 118
- 6.4 ORTHOPEDIC FIXATION DEVICES 119
  - 6.4.1 INTERNAL FIXATION DEVICES 122
    - 6.4.1.1 Reduced incidence of malunion or nonunion of injured bones to support adoption 122
  - 6.4.2 EXTERNAL FIXATION DEVICES 123
    - 6.4.2.1 Increasing incidence of upper and lower-extremity injuries to drive market 123
- 6.5 ARTHROSCOPY INSTRUMENTS 124
  - 6.5.1 RISING ARTHROSCOPY TREATMENT PROCEDURES TO SUPPORT MARKET GROWTH 124
- 6.6 ORTHOPEDIC BRACES & SUPPORTS 127
  - 6.6.1 KNEE BRACES & SUPPORTS 129
    - 6.6.1.1 Growing geriatric and obese populations to support market growth 129
  - 6.6.2 ANKLE BRACES & SUPPORTS 130
    - 6.6.2.1 Clinical benefits and favorable recommendations from physicians to support market growth 130
  - 6.6.3 FOOT WALKERS & ORTHOSES 131
    - 6.6.3.1 Rapidly growing diabetic population and subsequent rise in prevalence of foot problems to drive market 131
- 6.6.4 BACK, HIP, AND SPINE BRACES & SUPPORTS 132
  - 6.6.4.1 Rising incidence of lower spine disorders to propel market 132
- 6.6.5 SHOULDER BRACES & SUPPORTS 133
  - 6.6.5.1 Rising prevalence of shoulder arthritis to support market growth 133
- 6.6.6 ELBOW BRACES & SUPPORTS 134
  - 6.6.6.1 Rising prevalence of elbow-related osteoarthritis to drive adoption 134
- 6.6.7 HAND & WRIST BRACES & SUPPORTS 135
  - 6.6.7.1 Increasing incidence of hand and wrist injuries to drive market 135
- 6.6.8 FACIAL BRACES & SUPPORTS 135
  - 6.6.8.1 Rising number of plastic surgeries to propel market 135
- 6.7 ORTHOPEDIC PROSTHETICS 136
  - 6.7.1 SOLID ANKLE CUSHION HEEL PROSTHESES 139
    - 6.7.1.1 Inexpensive, durable, and virtually maintenance-free properties to boost adoption 139
  - 6.7.2 SINGLE-AXIAL PROSTHESES 139
    - 6.7.2.1 Need for periodic servicing to limit adoption 139

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.7.3 □MULTI-AXIAL PROSTHESES □140
  - 6.7.3.1 □High cost of multi-axial prostheses to limit market growth □140
- 6.7.4 □DYNAMIC RESPONSE PROSTHESES □141
  - 6.7.4.1 □Low weight and support for active lifestyles to drive adoption □141
- 6.7.5 □MICROPROCESSOR-CONTROLLED PROSTHESES □141
  - 6.7.5.1 □Higher stability and motion to support market growth □141
- 6.8 □BONE GRAFT SUBSTITUTES □142
  - 6.8.1 □AUTOGRAFTS □145
    - 6.8.1.1 □High success rate in anterior and posterior cervical arthrodesis to support growth □145
  - 6.8.2 □ALLOGRAFTS □145
    - 6.8.2.1 □Reduced post-operative hospital stay coupled with limited requirement of incisions to drive market growth □145
  - 6.8.3 □SYNTHETIC GRAFTS □146
    - 6.8.3.1 □Reduced risk of disease transmission and high degree of customization to support market growth □146
- 6.9 □ORTHOBIOLOGICS □147
  - 6.9.1 □VISCOSUPPLEMENTATION PRODUCTS □149
    - 6.9.1.1 □Cost-effectiveness of products to support market growth □149
  - 6.9.2 □DEMINERALIZED BONE MATRIX □150
    - 6.9.2.1 □Widespread acceptance in orthopedic surgery to fuel market growth □150
  - 6.9.3 □BONE MORPHOGENETIC PROTEINS □151
    - 6.9.3.1 □Osteoinductive properties and better integration in joint procedures to fuel market growth □151
  - 6.9.4 □PLASMA-RICH PROTEIN □152
    - 6.9.4.1 □Rising application of PRP in sports injuries to support market growth □152
  - 6.9.5 □BONE MARROW ASPIRATE CONCENTRATE □152
    - 6.9.5.1 □Minimally invasiveness procedure and less downtime to propel growth □152
- 7 □ORTHOPEdic DEVICES MARKET, BY PROCEDURE (VOLUME) □154
  - 7.1 □JOINT REPLACEMENT SURGERY PROCEDURAL VOLUME, BY SITE □155
  - 7.2 □ARTHROSCOPY PROCEDURAL VOLUME, BY SITE □157
- 8 □ORTHOPEdic DEVICES MARKET, BY SITE □159
  - 8.1 □INTRODUCTION □160
  - 8.2 □HAND & WRIST □160
    - 8.2.1 □RISING CASES OF RADIUS AND ULNA FRACTURES TO SUPPORT MARKET GROWTH □160
  - 8.3 □SPINE □161
    - 8.3.1 □TECHNOLOGICAL INNOVATIONS IN SPINAL IMPLANTS AND HIGHER INCIDENCE OF SPINAL SURGERY TO FUEL MARKET GROWTH □161
  - 8.4 □FOOT & ANKLE □162
    - 8.4.1 □RISING PREFERENCE FOR FOOT & ANKLE RECONSTRUCTION TO AUGMENT GROWTH □162
  - 8.5 □ARM & ELBOW □163
    - 8.5.1 □RISING INCIDENCE OF ARM FRACTURES TO ACCELERATE DEMAND FOR ORTHOPEDIC DEVICES □163
  - 8.6 □KNEE & THIGH □164
    - 8.6.1 □GROWING CASES OF COLLATERAL LIGAMENT INJURIES AND TENDON TEARS TO FUEL MARKET □164
  - 8.7 □HIP & PELVIS □165
    - 8.7.1 □RISING NUMBER OF PATIENTS UNDERGOING HIP REPLACEMENT SURGERY TO SUPPORT GROWTH □165
  - 8.8 □SHOULDER □166

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 8.8.1 INCREASING INCIDENCE OF SHOULDER INJURIES TO DRIVE MARKET 166
- 8.9 CRANIOMAXILLOFACIAL 167
- 8.9.1 INCREASING AWARENESS OF CRANIOMAXILLOFACIAL RECONSTRUCTIVE SURGERY TO PROPEL MARKET 167
- 9 ORTHOPEDIC DEVICES MARKET, BY APPLICATION 169
- 9.1 INTRODUCTION 170
- 9.2 FRACTURE TREATMENT & RECOVERY 170
- 9.2.1 RISING INCIDENCE OF FRACTURES TO BOOST DEMAND FOR ORTHOPEDIC DEVICES 170
- 9.3 SPINAL FUSION, FIXATION, AND DECOMPRESSION 171
- 9.3.1 GROWTH IN SPINAL FUSION SURGERIES TO DRIVE MARKET 171
- ?
- 9.4 RHEUMATOID ARTHRITIS & OSTEOARTHRITIS 172
- 9.4.1 RISING POOL OF RHEUMATOID ARTHRITIS AND OSTEOARTHRITIS PATIENTS TO DRIVE MARKET 172
- 9.5 LIGAMENT INJURIES 173
- 9.5.1 INCREASING PARTICIPATION IN SPORTS AND PHYSICAL ACTIVITIES TO SUPPORT MARKET GROWTH 173
- 9.6 DIABETIC FOOT DISEASES 174
- 9.6.1 GROWING PREVALENCE OF DIABETIC FOOT ULCERS TO SUPPORT MARKET GROWTH 174
- 9.7 NEUROLOGICAL DISORDERS 175
- 9.7.1 RISING INCIDENCE OF NEUROLOGICAL DISORDERS TO DRIVE MARKET 175
- 10 ORTHOPEDIC DEVICES MARKET, BY END USER 177
- 10.1 INTRODUCTION 178
- 10.2 HOSPITALS & SURGICAL CENTERS 178
- 10.2.1 RISING NUMBER OF ORTHOPEDIC SURGERIES COUPLED WITH INFRASTRUCTURE DEVELOPMENT TO DRIVE MARKET 178
- 10.3 AMBULATORY CARE CENTERS & TRAUMA UNITS 179
- 10.3.1 COST-EFFECTIVE TREATMENT OFFERED BY AMBULATORY CARE CENTERS TO PROPEL MARKET GROWTH 179
- 10.4 ORTHOPEDIC CLINICS 180
- 10.4.1 INCREASING NUMBER OF ORTHOPEDIC CLINICS TO SUPPORT MARKET GROWTH 180
- 10.5 HOME CARE SETTINGS 181
- 10.5.1 RISING PREFERENCE FOR HOME CARE TO SUSTAIN MARKET GROWTH 181
- 10.6 OTHER END USERS 182
- 11 ORTHOPEDIC DEVICES MARKET, BY REGION 183
- 11.1 INTRODUCTION 184
- 11.2 NORTH AMERICA 184
- 11.2.1 MACROECONOMIC OUTLOOK FOR NORTH AMERICA 184
- 11.2.2 US 192
- 11.2.2.1 US to dominate North American market 192
- 11.2.3 CANADA 197
- 11.2.3.1 Rising incidence of degenerative bone diseases to support market growth 197
- 11.3 EUROPE 201
- 11.3.1 MACROECONOMIC OUTLOOK FOR EUROPE 201
- 11.3.2 GERMANY 208
- 11.3.2.1 Germany to account for largest market share in Europe 208
- 11.3.3 FRANCE 212
- 11.3.3.1 Increasing prevalence of musculoskeletal disorders and significant adoption of orthopedic devices to support market

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

growth 212

?

11.3.4 UK 217

11.3.4.1 Increasing awareness of orthopedic conditions to drive adoption of innovative treatments 217

11.3.5 ITALY 221

11.3.5.1 Increasing awareness of preventive care for musculoskeletal injuries to drive market 221

11.3.6 SPAIN 225

11.3.6.1 Growing preference for minimally invasive surgical procedures to drive market 225

11.3.7 REST OF EUROPE 229

11.4 ASIA PACIFIC 233

11.4.1 MACROECONOMIC OUTLOOK FOR ASIA PACIFIC 233

11.4.2 JAPAN 241

11.4.2.1 Rapidly growing geriatric population to propel market 241

11.4.3 CHINA 245

11.4.3.1 Expanding target patient population to drive market 245

11.4.4 INDIA 249

11.4.4.1 Increasing number of hospitals adopting robotic-assisted joint replacement surgery to support market growth 249

11.4.5 AUSTRALIA 254

11.4.5.1 Favorable government and private initiatives to promote market growth 254

11.4.6 SOUTH KOREA 258

11.4.6.1 Rising R&D and funding to drive market 258

11.4.7 REST OF ASIA PACIFIC 262

11.5 LATIN AMERICA 265

11.5.1 MACROECONOMIC OUTLOOK FOR LATIN AMERICA 266

11.5.2 BRAZIL 273

11.5.2.1 Strong presence of global players to drive market 273

11.5.3 MEXICO 277

11.5.3.1 Favorable investment scenario for medical device manufacturers to support market growth 277

11.5.4 REST OF LATIN AMERICA 281

11.6 MIDDLE EAST & AFRICA 285

11.6.1 MACROECONOMIC OUTLOOK FOR MIDDLE EAST & AFRICA 286

11.6.2 GCC COUNTRIES 292

11.6.2.1 Growing public-private partnerships to propel the market growth 292

11.6.3 REST OF MIDDLE EAST & AFRICA 296

12 COMPETITIVE LANDSCAPE 301

12.1 OVERVIEW 301

12.2 KEY PLAYER STRATEGIES/RIGHT TO WIN (2024) 301

12.2.1 OVERVIEW OF STRATEGIES DEPLOYED BY KEY COMPANIES 302

12.3 REVENUE ANALYSIS, 2019-2023 304

12.4 MARKET SHARE ANALYSIS, 2023 305

12.4.1 RANKING OF KEY MARKET PLAYERS 306

12.5 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2023 307

12.5.1 STARS 307

12.5.2 EMERGING LEADERS 307

12.5.3 PERVASIVE PLAYERS 307

12.5.4 PARTICIPANTS 307

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

12.5.5	COMPANY FOOTPRINT: KEY PLAYERS, 2023	309
12.5.5.1	Company footprint	309
12.5.5.2	Region footprint	310
12.5.5.3	Product footprint	311
12.5.5.4	Application footprint	312
12.5.5.5	Site footprint	313
12.5.5.6	End-user footprint	314
12.6	COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2023	314
12.6.1	PROGRESSIVE COMPANIES	314
12.6.2	RESPONSIVE COMPANIES	314
12.6.3	DYNAMIC COMPANIES	315
12.6.4	STARTING BLOCKS	315
12.6.5	COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2023	316
12.6.5.1	Detailed list of key startups/SMEs	316
12.6.5.2	Competitive benchmarking of key startups/SMEs	317
12.7	COMPANY VALUATION & FINANCIAL METRICS	318
12.7.1	COMPANY VALUATION	318
12.7.2	FINANCIAL METRICS	319
12.8	BRAND/PRODUCT COMPARISON	320
12.9	COMPETITIVE SCENARIO	321
12.9.1	PRODUCT LAUNCHES & APPROVALS	321
12.9.2	DEALS	323
13	COMPANY PROFILES	325
13.1	KEY PLAYERS	325
13.1.1	ZIMMER BIOMET	325
13.1.1.1	Business overview	325
13.1.1.2	Products offered	326
13.1.1.3	Recent developments	330
13.1.1.3.1	Product approvals	330
13.1.1.3.2	Deals	331
13.1.1.4	MnM view	331
13.1.1.4.1	Key strengths	331
13.1.1.4.2	Strategic choices	331
13.1.1.4.3	Weaknesses and competitive threats	331
13.1.2	STRYKER	332
13.1.2.1	Business overview	332
13.1.2.2	Products offered	333
13.1.2.3	Recent developments	338
13.1.2.3.1	Product launches	338
13.1.2.3.2	Deals	338
13.1.2.3.3	Expansions	339
13.1.2.4	MnM view	339
13.1.2.4.1	Key strengths	339
13.1.2.4.2	Strategic choices	339
13.1.2.4.3	Weaknesses and competitive threats	339
13.1.3	JOHNSON & JOHNSON MEDTECH	340
13.1.3.1	Business overview	340

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 13.1.3.2 Products offered 341
- 13.1.3.3 Recent developments 344
  - 13.1.3.3.1 Product launches & approvals 344
  - 13.1.3.3.2 Deals 345
- 13.1.3.4 MnM view 345
  - 13.1.3.4.1 Key strengths 345
  - 13.1.3.4.2 Strategic choices 345
  - 13.1.3.4.3 Weaknesses and competitive threats 345
- 13.1.4 SMITH+NEPHEW 346
  - 13.1.4.1 Business overview 346
  - 13.1.4.2 Products offered 348
  - 13.1.4.3 Recent developments 349
    - 13.1.4.3.1 Product launches & approvals 349
    - 13.1.4.3.2 Deals 350
    - 13.1.4.3.3 Expansions 351
  - 13.1.4.4 MnM view 351
    - 13.1.4.4.1 Key strengths 351
    - 13.1.4.4.2 Strategic choices 351
    - 13.1.4.4.3 Weaknesses and competitive threats 351
- 13.1.5 B. BRAUN MELSUNGEN AG 352
  - 13.1.5.1 Business overview 352
  - 13.1.5.2 Products offered 353
  - 13.1.5.3 Recent developments 355
    - 13.1.5.3.1 Deals 355
  - 13.1.5.4 MnM view 355
    - 13.1.5.4.1 Key strengths 355
    - 13.1.5.4.2 Strategic choices 355
    - 13.1.5.4.3 Weaknesses and competitive threats 356
- ?
- 13.1.6 GLOBUS MEDICAL 357
  - 13.1.6.1 Business overview 357
  - 13.1.6.2 Products offered 358
  - 13.1.6.3 Recent developments 361
    - 13.1.6.3.1 Product launches & approvals 361
    - 13.1.6.3.2 Deals 362
- 13.1.7 ARTHREX, INC. 363
  - 13.1.7.1 Business overview 363
  - 13.1.7.2 Products offered 363
  - 13.1.7.3 Recent developments 368
    - 13.1.7.3.1 Product approvals 368
- 13.1.8 ENOVIS 369
  - 13.1.8.1 Business overview 369
  - 13.1.8.2 Products offered 370
  - 13.1.8.3 Recent developments 374
    - 13.1.8.3.1 Product launches & approvals 374
    - 13.1.8.3.2 Deals 375
    - 13.1.8.3.3 Expansions 376

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

13.1.9	ACUMED LLC	377
13.1.9.1	Business overview	377
13.1.9.2	Products offered	377
13.1.9.3	Recent developments	379
13.1.9.3.1	Product launches	379
13.1.9.3.2	Deals	380
13.1.9.3.3	Expansions	380
13.1.10	ORTHOFIX MEDICAL INC.	381
13.1.10.1	Business overview	381
13.1.10.2	Products offered	382
13.1.10.3	Recent developments	385
13.1.10.3.1	Product launches & approvals	385
13.1.10.3.2	Deals	386
13.1.11	MICROPORT SCIENTIFIC CORPORATION	387
13.1.11.1	Business overview	387
13.1.11.2	Products offered	388
13.1.11.3	Recent developments	389
13.1.11.3.1	Product launches & approvals	389
13.1.11.3.2	Deals	390
13.1.12	CONMED CORPORATION	391
13.1.12.1	Business overview	391
13.1.12.2	Products offered	393
13.1.12.3	Recent developments	394
13.1.12.3.1	Deals	394
13.1.13	PARAGON 28, INC.	395
13.1.13.1	Business overview	395
13.1.13.2	Products offered	396
13.1.13.3	Recent developments	398
13.1.13.3.1	Product launches & approvals	398
13.1.13.3.2	Deals	399
13.1.14	MEDACTA INTERNATIONAL	400
13.1.14.1	Business overview	400
13.1.14.2	Products offered	401
13.1.14.3	Recent developments	402
13.1.14.3.1	Product launches & approvals	402
13.1.14.3.2	Deals	403
13.1.14.3.3	Expansions	403
13.1.15	MERIL LIFE SCIENCES PVT. LTD.	404
13.1.15.1	Business overview	404
13.1.15.2	Products offered	404
13.1.15.3	Recent developments	406
13.1.15.3.1	Expansions	406
13.1.16	MAXX ORTHOPEDICS, INC.	407
13.1.16.1	Business overview	407
13.1.16.2	Products offered	407
13.1.16.3	Recent developments	408
13.1.16.3.1	Product approvals	408

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 13.1.16.3.2 Deals 408
- 13.2 OTHER PLAYERS 409
  - 13.2.1 FH ORTHO 409
  - 13.2.2 SYMBIOS ORTHOPEDIE S.A. 410
  - 13.2.3 MADISON ORTHO 411
  - 13.2.4 GREEN SURGICALS PVT. LTD. 413
  - 13.2.5 SIORA SURGICAL PVT. LTD. 418
  - 13.2.6 ORTHOPEDIATRICS CORP. 422
  - 13.2.7 RESTOR3D 423
  - 13.2.8 DOUBLE MEDICAL TECHNOLOGY INC. 424
  - 13.2.9 TREACE MEDICAL CONCEPTS, INC. 427
  - 13.2.10 AK MEDICAL 428
- 14 APPENDIX 430
  - 14.1 DISCUSSION GUIDE 430
  - 14.2 KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL 436
  - 14.3 CUSTOMIZATION OPTIONS 438
  - 14.4 RELATED REPORTS 438
  - 14.5 AUTHOR DETAILS 440

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

**Orthopedic Devices Market by Product (Fixation, Replacement, Prosthetics, Spinal Implant, Brace, Orthobiologics (DBM), Bone Graft), Procedures Volume (Knee, Hip, Ankle, Shoulder) Site, Application, End User (Hospital, ASC, Trauma) - Global Forecast to 2030**

Market Report | 2025-03-06 | 441 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scott's-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$12000.00
	Multi User	\$14000.00
	Corporate License	\$16000.00
	Enterprise Site License	\$21000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scott's-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scott's-international.com

www.scott's-international.com

Zip Code\*

Country\*

Date

2026-03-16

Signature

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com