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Knee Replacement - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 113 pages | Mordor Intelligence

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Report description:

Knee Replacement Market Analysis

The Knee Replacement Market size is estimated at USD 12.31 billion in 2025, and is expected to reach USD 15.49 billion by 2030, at a CAGR of 4.73% during the forecast period (2025-2030).

Growth rests on a confluence of factors: the rapid expansion of the ?65-year population, escalating obesity prevalence, and steady improvements in implant design and surgical techniques. Technology adoption is shifting the field toward data-guided precision, with robotic platforms gaining traction among both high-volume hospitals and ambulatory surgical centers. Parallel reimbursement reforms now reward same-day discharge protocols, intensifying competition between inpatient and outpatient settings. Manufacturers are responding through product line extensions, platform acquisitions, and greater focus on sustainability commitments, moves that influence surgeon preferences and purchasing decisions in every major geography.

Global Knee Replacement Market Trends and Insights

Ageing and Obese Population Growth

Rising life expectancy is intersecting with sedentary lifestyles to boost osteoarthritis incidence and accelerate knee arthroplasty demand. Utilization remains highest in the 65-74 cohort, yet the 75-84 group records the fastest growth, while women in high-income markets undergo total knee procedures at rates nine times higher than men. Increasing implant durability now supports interventions in patients in their early 50s, enlarging the addressable pool and shifting revision surgery burdens further into the future.

Rapid Adoption of Robotic-Assisted Total Knee Replacement

Clinical studies now link robotic assistance to tighter ligament balancing, fewer alignment outliers, and higher early-stage patient-reported outcome scores. Stryker's Mako platform has surpassed 1.5 million cumulative procedures, with 95% of surveyed surgeons citing enhanced intra-operative confidence. Johnson & Johnson's VELYS system secured FDA clearance in 2024 for unicompartmental knees without CT-based planning, challenging incumbent dominance and spurring a technology race centered on workflow integration and cost-effectiveness.

Price-Cap Regulations in China and India

China's volume-based procurement framework cut average knee implant prices by 50%, with devices accounting for 93.21% of total inpatient savings. India's National Pharmaceutical Pricing Authority imposed caps deemed misaligned with R&D costs, prompting ongoing trade disputes. Manufacturers now segment portfolios into premium and value tiers to shield innovation budgets against mandated markdowns.

Other drivers and restraints analyzed in the detailed report include:

Expansion of Outpatient (ASC) Reimbursement Programs / Arthroplasty Capacity Expansion in Emerging Markets / Economic Burden of Revision Surgeries /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Total knee replacement procedures command 71.24% market share in 2024 while simultaneously leading growth at 5.83% CAGR through 2030, creating a rare market dynamic where the dominant segment also drives expansion. This phenomenon reflects the procedure's versatility in addressing various pathologies and the continuous innovation in implant design and surgical techniques. Partial knee replacement procedures are gaining traction as robotic assistance improves precision and outcomes, with Johnson & Johnson's VELYS system receiving FDA clearance for unicompartmental procedures in 2024, addressing the historical underutilization of bone-preserving techniques.

Patellofemoral replacement represents a niche but growing segment, particularly for younger patients with isolated anterior knee pain, while revision and complex knee replacement procedures are experiencing increased demand as the installed base of primary implants ages. The revision segment faces unique challenges, including bone loss management and component compatibility issues, driving innovation in modular implant systems and custom 3D-printed solutions. Zimmer Biomet's Oxford Cementless Partial Knee, approved by the FDA in 2024 as the only cementless partial knee implant in the United States, demonstrates 94.1% implant survival at 10 years, significantly exceeding average partial knee performance metrics.

The Knee Replacement Market Report is Segmented by Product (Total Knee Replacement, Partial Knee Replacement, Patellofemoral Replacement, and More), Surgical Technology (Manual, Robotic-Assisted, and More), End User (Hospitals, Ambulatory Surgical Centres (ASC), and More), and Geography (North America, Europe, Asia-Pacific, Middle East and Africa, South America). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America led the knee replacement market with 41.11% revenue in 2024, driven by more than 790,000 annual procedures in the United States, strong technology adoption, and robust private-payer coverage. Canada's publicly funded system introduces wait-time constraints, prompting outbound medical travel to U.S. and Mexican facilities. Mexico capitalizes on that flow, expanding private orthopedic institutes that market US-trained surgeons and bundled robotics packages. Payer pressure to curtail inpatient lengths of stay is sharpening focus on value-based purchasing, while device excise taxes remain under legislative review.

Europe displays a mature yet heterogeneous profile. Germany retains the highest procedure volume, but reimbursement cuts in France trimmed implant prices by 25%, squeezing provider margins and slowing premium adoption. The United Kingdom's NHS elective backlog spurs contracting with private hospitals to reach activity targets. Southern European nations, helped by European Investment Bank funding, modernize operating theaters but run lean implant formularies to control costs. Eastern European markets start from lower baselines; EU cohesion funds and skill-transfer partnerships speed orthopedic ward upgrades. Environmental procurement criteria such as carbon-footprint disclosures, pioneered in Scandinavia, are gaining cross-border traction and could reshape vendor qualification standards.

Asia-Pacific contributes the highest growth at a 15.08% CAGR and is set to transform the global knee replacement market by 2030. China's volume-based procurement halved device prices yet did not dent procedure uptake; hospitals instead chase throughput to offset lower margins. Japan registers 82,304 annual primary knees, with ceramic-on-ceramic bearings reflecting cultural aversion to metal ions. South Korea's procedure rate grew 407% over the past decade, supported by national insurance and aggressive marketing of minimally invasive methods. India balances burgeoning demand against price caps, stimulating domestic implant manufacture albeit with constrained innovation budgets. Australia's injury incidence of 83.9 per 100,000 males illuminates rising sports-related knee trauma, feeding pipeline demand even as government cost-containment tightens.

List of Companies Covered in this Report:

Zimmer Biomet / Stryker / Johnson?&?Johnson / Smiths Group / B. Braun (Aesculap) / Exactech / Medacta Group / MicroPort Orthopedics / Medtronic / Corin Group / Conformis Inc. / THINK Surgical / Waldemar Link GmbH / DJO Global / United Orthopedic Corp. / LimaCorporate / Amplitude SAS / Auxein Medical / Arthrex / SurgTech /

Additional Benefits:

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

Table of Contents:

5.4.3.2 Japan
5.4.3.3 India
5.4.3.4 Australia
5.4.3.5 South Korea
5.4.3.6 Rest of Asia-Pacific
5.4.4 Middle East & Africa
5.4.4.1 GCC
5.4.4.2 South Africa
5.4.4.3 Rest of Middle East & Africa
5.4.5 South America
5.4.5.1 Brazil
5.4.5.2 Argentina
5.4.5.3 Rest of South America

6 Competitive Landscape
6.1 Market Concentration
6.2 Market Share Analysis
6.3 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products & Services, and Recent Developments)
6.3.1 Zimmer Biomet
6.3.2 Stryker Corporation
6.3.3 Johnson & Johnson (DePuy Synthes)
6.3.4 Smith & Nephew plc
6.3.5 B. Braun (Aesculap)
6.3.6 Exactech Inc.
6.3.7 Medacta Group
6.3.8 MicroPort Orthopedics
6.3.9 Medtronic plc
6.3.10 Corin Group
6.3.11 Conformis Inc.
6.3.12 THINK Surgical
6.3.13 Waldemar Link GmbH
6.3.14 DJO Global (Enovis)
6.3.15 United Orthopedic Corp.
6.3.16 LimaCorporate
6.3.17 Amplitude SAS
6.3.18 Auxein Medical
6.3.19 Arthrex Inc.
6.3.20 SurgTech Inc.

7 Market Opportunities & Future Outlook
7.1 White-space & Unmet-Need Assessment

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