

**PUBLISHED MAY 2023 • 12<sup>TH</sup> EDITION**

# THE WORLDWIDE ORTHOPEDIC & SPINE CONTRACT MANUFACTURING MARKET REPORT 2022-2027

& TOP **100** SUPPLIER PROFILES

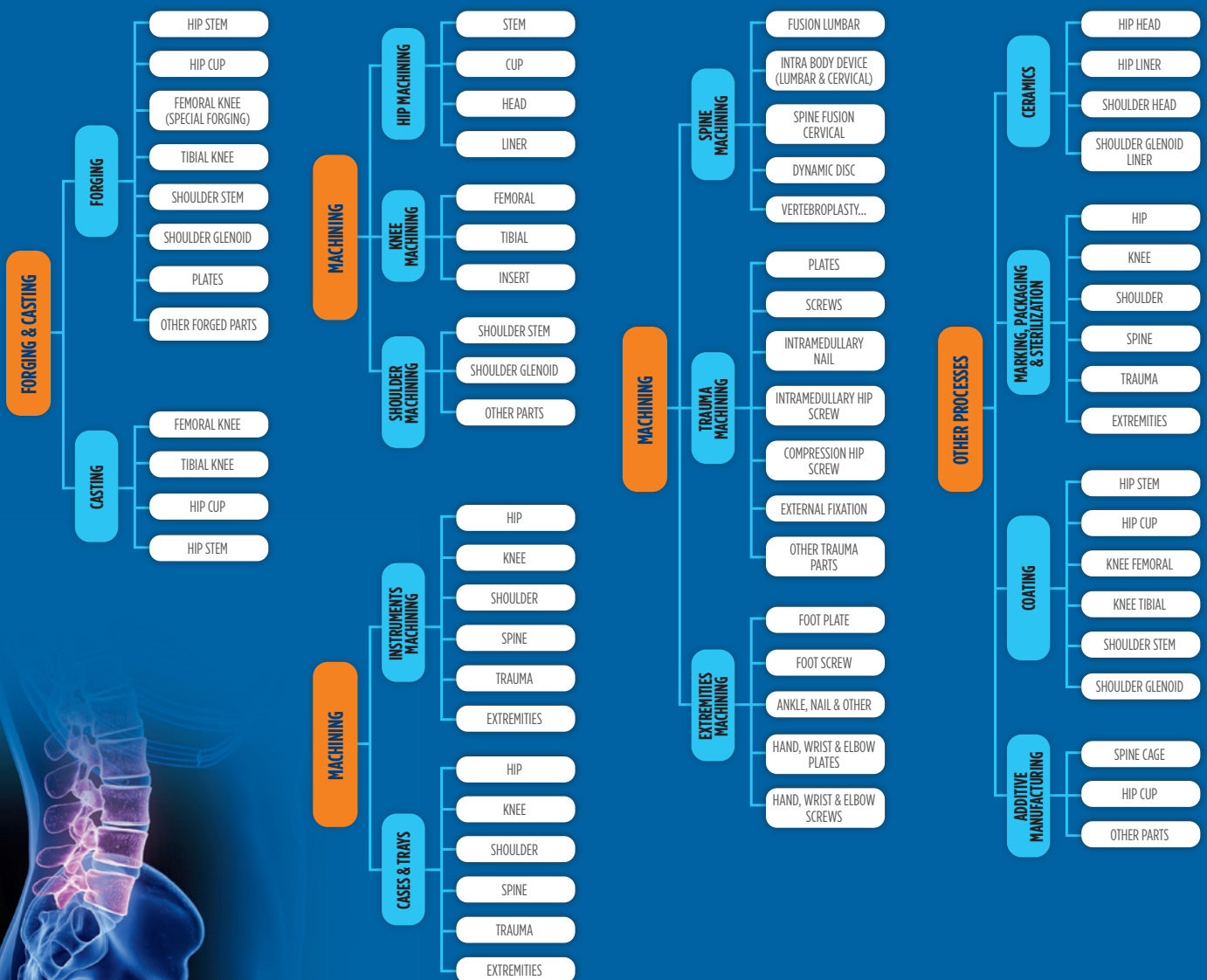
## U • P • D • A • T • E • S

- Complete overview of the **orthopedic end-user market**: markets, prices, players, strategic trends & moves
- **Spine, Trauma, extremities and shoulder** contract manufacturing, detailed and separate analyses
- **Inflation**: Impact on the contract manufacturing business and the orthopedic end-user market
- **3D printing for orthopedics**: Contract manufacturing & in-house market sizes and forecasts
- **MDR**: Decreased competitiveness of the European orthopedic industry, scenarios of short and long term impact on the players
- **Robotics for orthopedics**: How did Stryker turn robotics into a competitive weapon in the US?
- **Chrome Cobalt**: What are the alternatives and when will they be available?
- A plethora of strategic information on the **Top 100 contract manufacturers**, with 125 profiles - including those of acquired companies



# "WHERE IS GROWTH ?" IN-DEPTH ANALYSIS COVERING 14 SEGMENTS / 62 SUB-SEGMENTS ON THE US\$8B WORLDWIDE ORTHOPEDIC CONTRACT MANUFACTURING MARKET

Contract Manufacturing segmentation: 14 segments & 62 sub-segments



Source : Avicenne 2022

## ASSESS YOUR CUSTOMERS' NEEDS WITH OUR DETAILED ANALYSIS OF THE DEMAND FOR OEM CONTRACT MANUFACTURING

**For each of the Majors OEMs below, the following data is provided:**

- Manufacturing strategy with underlying detailed volume and value data
- Facility locations for each product
- Outsourcing vs in-house % for implants, instruments, cases & trays, coating, ceramics, packaging
- In-house vs Contract Manufacturing volumes per product for forging, casting, machining, 3D printing, coating, instruments, cases & trays, etc.

**stryker**

**ZIMMER BIOMET**

**DePuy Synthes**

**SmithNephew**

**Medtronic**

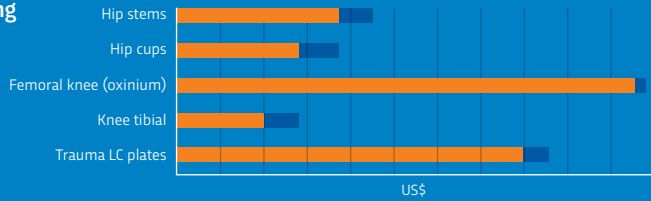
**All other Challengers**

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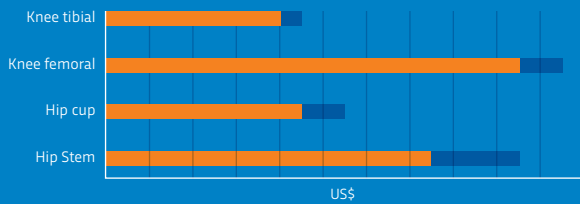
## POSITION YOUR OFFER WITH OUR PRICE DASHBOARDS, AVAILABLE FOR EACH PRODUCT BY MANUFACTURING METHOD

For each product and its manufacturing method, the Average Selling Price (ASP) is provided, with the min/max spread.

### Forging



### Casting



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## UNDERSTAND COMPETITION DYNAMICS WITH MARKET SHARES & COMPANY DATA

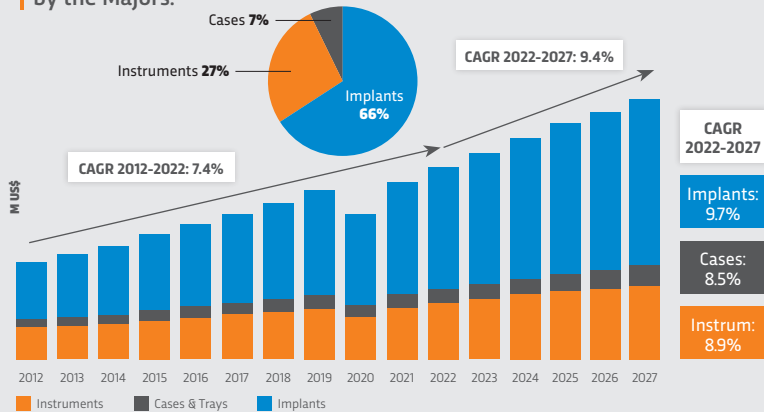
### AVICENNE provides four main data components:

- Historical and forecast market size plus current market shares for each product
- Manufacturing method
- Market breakdown by In-house vs Contract Manufacturing and main OEM buyers
- CMOs' main customers / OEM preferred suppliers.
- **Implants:** Tecomet, Orchid, Viant, Lisi, Avalign, Marle, Norman Noble, PCC, Paragon, Medilant Group, etc. (70+ companies mentioned)
- **Instruments:** Tecomet, Viant, Intech, Avalign, Autocam Medical, Norwood, Orchid, Lisi, Tegra, etc. (45+)
- **Cases & trays:** Tecomet, Paragon, Viant, Avalign, Medin, Intech, RMS, Inomed, etc. (20+)
- **Coating:** Orchid, Lincotek, Viant, DOT, APS Materials, Terolab, Medical Group, Medicoat, etc.
- **3D printing:** Stryker, Zimmer Biomet, Lima, Adler, Lincotek, Cretex, Avalign as well as Arcam, EOS, Concept Laser, SLM, 3D Systems.
- Also main players data for forging, casting, machining Spine, Trauma, Extremities & Shoulder, instruments manufacturing, cases & trays manufacturing, coating, ceramics, packaging.
- Player profiles for all the segments including orthobiologics, ceramics, additive

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## IDENTIFY CONTRACT MANUFACTURING MARKET TRENDS WITH VALUE FORECASTS TO 2027

The Contract Manufacturing market is growing by 9.4% per year, a higher rate than the general orthopedic market. The main drivers are, firstly, challengers who outsource more taking market share away from the Majors and, secondly, gradual divestment by the Majors.



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## CONTRACT MANUFACTURING COMPANY RANKINGS & TOP 100 SUPPLIER PROFILES

Example of profile:



**SINCE 2005**

**IMPLANTS 2023**

International conference on innovation for orthopedic implants and orthobiologics

CONFERENCE FOUNDED AND CHAIRED BY **avicenne** CELEBRATING 30 years of putting customers at the center

**Avicenne's Insights**

**WORLDWIDE ORTHOPEDIC MARKET & TECHNOLOGY 2026 OUTLOOK AND KEY TRENDS**

Avicenne is also the creator of IMPLANTS, a worldwide conference focusing on Strategy, Innovation & Regulatory in the orthopedic world. Recent IMPLANTS conferences attracted more than 250 international Decision-makers. Ali Madani highlighted how manufacturing techniques and purchasing strategies are evolving, how Robotics and Additive Manufacturing will alter the future landscape and how to cope with Regulatory burdens.

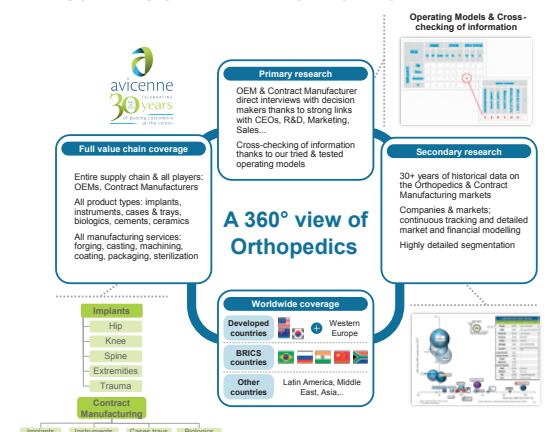
Ali Madani tutorials presented the two main following topics:

- Orthopedic Market perspectives and main issues,
- Orthopedic Contract Manufacturing Markets.



[www.tutorials.implants-event.com](http://www.tutorials.implants-event.com)

## SURVEY METHODOLOGY BASED ON DIRECT INTERVIEWS AND 30 YEARS OF MARKET MONITORING



# ORDER FORM

## WORLDWIDE ORTHOPEDIC & SPINE CONTRACT MANUFACTURING MARKET REPORT 2022-2027 & TOP 100 SUPPLIER PROFILES

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### PRODUCT OPTIONS

#### MAIN REPORT

Worldwide Orthopedic & Spine Contract Manufacturing Market Report 2022-2027 & Top 100 supplier profiles

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NUMBER OF EXHIBITS

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1,000+ exhibits

**SINGLE LICENSE**  
Single license allows the use of the report on one and only one location of the same company.

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#### OTHER CONSULTING SERVICES: AD HOC STUDIES, VENDOR, COMMERCIAL & STRATEGIC DUE DILIGENCE

AVICENNE was founded in 1992 by Ali Madani and has been operating on strategic and marketing studies in the medical sector since then. AVICENNE has advised major players in this industry (Medtronic, Stryker, Zimmer Biomet, Depuy Synthes, etc.) with their strategy development and implementation, technical and economic appraisals, mergers and acquisitions. AVICENNE has also advised many Private Equity firms on acquisitions and build-ups. AVICENNE has worked with Major and Mid-size companies on their entry strategy for new markets, adjacencies or new geographic territories as well as business model improvements and partnership strategies. Globally, AVICENNE has been involved in more than 320 projects for 100+ customers in the medical device industry. AVICENNE has published several annual surveys such as "European orthopedic Market" and "Worldwide orthopedic Contract Manufacturing market and top 100 supplier profiles". AVICENNE's Managing Partner, Ali Madani is a speaker and chairman of several medical device conferences worldwide. He founded "IMPLANTS" a medical device industry conference and exhibition, focusing on manufacturing, innovation and buying strategies, which he has chaired ever since.



#### Contact Ali Madani

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Please select:

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**2** - E-mail the order form to a.madani@avicenne.com

**3** - Mail the order form to AVICENNE,  
42, avenue de la Grande Armée - 75017 PARIS, FRANCE

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Date, Signature or Stamp

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Job Title:

Company:

Email:

Address:

City/Country:

Phone:  Fax:

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