

Table of Contents



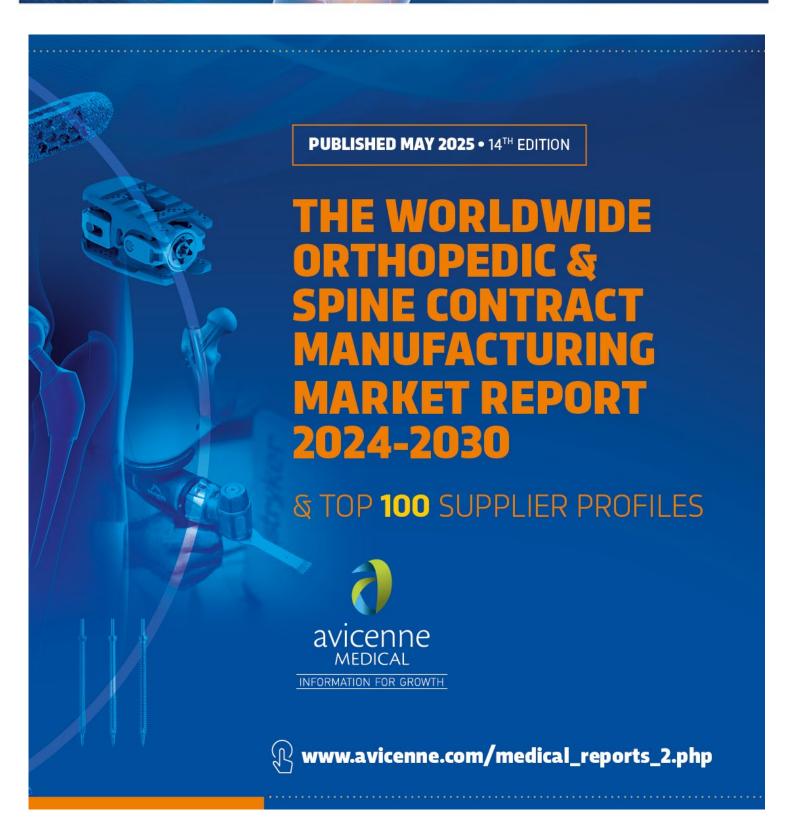




Table of Contents of the worldwide orthopedic & spine Contract Manufacturing Market 2024 -2030 & Top 100 supplier profiles 400+ pages 1,000+ exhibits

May 2025 - 14th edition

	Purpose of the Survey and Met	hodology
	Synopsis & Executive summary	
7		
9		oduct & by player
9	, р.	
9		ycle of orthopedic products and forecasts for 2030
7		•
9	,	
9	Contract Manufacturing market & trends: Casting	
7		-
7	3	
7	Contract Manufacturing market & trends: Coating	
7	Contract Manufacturing market & trends: Coses & trays	
9	Contract Manufacturing market & trends: Cases & trays Contract Manufacturing market & trends: Ranking of top players	
9		& trends: Top20, Top 21-100 and top 101 -1 000 distribution of revenues
9		& trends: rop20, rop 21-100 and top 101-1 000 distribution of revenues & trends: consolidation by acquisition- Forecasts by service for 2030
9		rket is growing faster than In-house manufacturing
0		& trends: Additive Manufacturing for hip, knee, knee, shoulder& trauma
0		& trends: Additive Manufacturing for hip, knee, knee, shoulder & trauma & trends: Additive Manufacturing for spine & Additive Manufacturing machines in 2024 and usage forecasts for 203
		34
6		
9	8	serveried as interest the state of a size of a size of a size of the size of t
0		conomical, social/culture, technological, environment, legal & regulatory
		nala assau CC
ð ð		opie over 65
	 Demographic & Economic Orthopedics is generally risk-averse with 	h faus dissenting innovations, many small ingramantal innovations
		h few disruptive innovations, many small incremental innovations
	Innovation and new products pull the m	
3	5	v products, % of the surgeons by category in each type of country
0		
	Regulatory & Certification	
	Reimbursement and pricing regulation	to Europe
	MDR (Medical Device Regulation): Impa	·
	·	remain valid for about 5 years, which will necessitate a mandatory request for validation under MDR, backed up by
	clinical studies, before the MDD expiry	
	Hip Price trends in Europe show regular	
	·	t frequent, hence they have been manageable over the long term
	Hip ASP erosion in developed countries	
		-2024: France, Germany, UK, Italy, Average Europe
	.	d in Europe (€), including country disparities
	6 Group purchasing in Germany, France a	nd Italy
	The orthopedic sales channels	
	Worldwide orthonedic & snine	market; players, drivers & limiters and forecasts 2024 - 203052
		market, players, arrers & innicers and forecasts 2027 2030
	 Orthopedics Ecosystem Worldwide orthopedic markets in 2024 by 	, woodust
	Worldwide orthopedic markets in 2024 by	/ product

Table of Contents of the worldwide orthopedic & spine Contract manufacturing Market 2024-2030 & Top 100 supplier profiles

Worldwide implants market in 2024 by value (B\$): Knee, hip, spine and by area, USA, Europe, Row

Worldwide implants market knee, hip & spine in 2024 by value (BUS\$)

Hip & Knee sales per area: USA, Europe, Japan, Australia, Korea & Row

Ratio for 10,000 inhabitants & growth by area (2024) Worldwide orthopedic market in 2024: competition

Worldwide implants market Trauma, shoulder & Extremities in 2024 by value (BUS\$)

II-

6



- Worldwide competition by product in 2024: Market share
- 7 Three types of Challengers competing with the Majors
- Top 4 vs. Challengers for hip & knee worldwide markets: Majors have no growth while challengers are growing fast
- Note: If we exclude Stryker, the results are much more revealing: The 3 majors have been flat over 10 years, while the challengers have grown by 5.5% per year
- dip, knee & shoulder challengers are growing faster than the market average
- Spine challengers are grabbing market share from the Majors and emerging as top players with revenues ranging from US\$0.5B US\$1B
- 3 Spine: Worldwide market shares 2012-2024: Majors limit market share losses by buying rivals
- 7 Trauma: Worldwide player market shares, 2016-2024
- Hip Europe market share 2012-2024: Depuy Synthes, Zimmer Biomet, Stryker, Smith & Nephew & other
- Mr. Knee Europe market share 2012-2024: Depuy Synthes, Zimmer Biomet, Stryker, Smith & Nephew & other
- Ohallengers have continuously gained market share 2018-2024 Except in 2020 due to Covid impact
- Majors Vs Challengers : Revenues CAGR, market shares
- Majors Vs Challengers: 2024 picture
- Ohallengers growing Vs majors
- 3 Smith & Nephew and ATEC comparison: average new products launched per year
- Reasons why Challengers are growing faster than Majors (except during Covid crisis)
- d Hip ASP erosion in developed countries 2012-2024
- 7 Knee ASP erosion in developed countries 2012-2024
- Forecast Price erosion 2024 -2030: USA, Australia, Japan, Europe
- The life cycle of orthopedic products: Growth forecasts by 2030 for hip, knee, spine, extremities
- Worldwide orthopedic market forecasts 2000-2030 for hip, knee, extremities, shoulder, trauma, spine, orthobiologics & Others
- Summary: Orthopedic market

III- Worldwide orthopedic & spine Contract Manufacturing market, OEM strategies, Contract Manufacturers position, market share and forecasts to 203086

- Zimmer Biomet: main facilities details
- OEM contract manufacturing strategy: Zimmer Biomet
- OEM contract manufacturing strategy: Stryker
- OEM contract manufacturing strategy: Depuy Synthes
- OEM contract manufacturing strategy: Smith & Nephew
- OEM contract manufacturing needs: Medtronic
- OEM contract manufacturing needs: Globus-Nuvasive
- OEM contract manufacturing needs: Challengers
- Contract Manufacturing process segmentation & raw materials: 14 segments & 70 sub-segments
- Forging Contract Manufacturing market 2024
- Forging Contract Manufacturing market 2012-2030 by product
- Forging Contract Manufacturing market share in 2024: Tecomet, Marle, Orchid, Lisi, PMP, etc.
- Forging Contract Manufacturing market: OEMs relationships with their suppliers
- Casting Contract Manufacturing market 2024
- Casting Contract Manufacturing market 2012-2030 by product
- dasting Contract Manufacturing market share in 2024: Orchid, PCC, Marle, Lincotek, Tecomet, etc.
- Casting Contract Manufacturing market: OEMs relationships with their suppliers
- Hip machining & finishing Contract Manufacturing market 2024
- Hip machining & finishing Contract Manufacturing market 2012-2030 by product
- Mnee machining & finishing Contract Manufacturing market 2024
- 6 Knee machining & finishing Contract Manufacturing market 2012-2030 by product
- 3 Shoulder machining & finishing Contract Manufacturing market 2024
- 3 Shoulder machining & finishing Contract Manufacturing market 2012-2030 by product
- 3 Spine implants machining & finishing Contract Manufacturing market 2024
- Spine implants machining & finishing Contract Manufacturing market 2012-2030
- Trauma implants machining & finishing Contract Manufacturing market 2024
- Trauma implants machining & finishing Contract Manufacturing market 2012-2030

 Fytremities implants machining & finishing Contract Manufacturing market 2024
- Extremities implants machining & finishing Contract Manufacturing market 2024
 Extremities implants machining & finishing Contract Manufacturing market 2012-2030
- 3 Spine, Trauma, Extremities & Shoulder Contract Manufacturing market 2024-2030
- Player market shares: Spine, Trauma, Extremities & Shoulder contract manufacturing in 2024
- What are orthopedic instruments for knee, hip, spine, trauma, shoulder & extremities?
- 7 Knee orthopedic instruments: functional segmentation
- Knee orthopedic instrument segmentation: 150 to 200 pieces



- dip orthopedic instrument segmentation: 80 to 150 pieces
- 3 Spine instruments: 30 to 50 pieces
- 3 Spine orthopedic instruments product segmentation
- 7 Trauma instruments segmentation: 10 to 20 pieces
- The Major OEMs have a different outsourcing strategy Vs the challengers. The challengers outsource almost all their instruments
- Instruments life cycle: New OEM projects lead to instruments set manufacturing. When an OEM postpones the launch of its new projects (for example during the 2008 & 2011 crisis & during Covid 19), it also drastically reduces its instruments manufacturing
- Outting tools: Single-use trend: Single-use is a pressing demand from surgeons
- Outting tools: Single-use trend: Single-use is growing rapidly in the US and Europe
- Instruments Contract Manufacturing market 2024
- Instruments Contract Manufacturing market 2012-2030 by product
- Instruments Contract Manufacturing market share in 2024: Tecomet, Intech, Jabil, Paragon, etc.
- Orthopedic robotic market in 2024: MAKO from Stryker, ROSA from Zimmer Biomet, Corin, TANVI, Navio of Smith, Mazor from Medtronic and Velys from Depuy Synthes
- Navigation Vs robotic assisted surgery
- Mako's acquisition by Stryker boosted the orthopedic robotic market and have a huge impact on instruments market
- Orthopedic robotics surgeries: Stryker open the mass market, Smith & Nephew, Zimmer Biomet, Depuy and many others have followed
- New generations of Mako for shoulder and spine surgery planned for the coming years Roadmap 2013-2024
- Zimmer Biomet with Rosa roadmap 2013-2024
- 3 Smith & Nephew with Navio & Cori roadmap 2015-2024
- Depuy Synthes with Velys roadmap 2018-2024
- Robotic orthopedic system benchmark in details: CT scan based or not, technical support...
- Mako, Rosa, Velys and Cori benchmark Operating cost / Acquisition cost
- Robotic assisted surgeries: USA is by far the leading country for Robotics usage. 2014-2024 procedures by robotic systems
- Product benchmarking: Mako is the robot with the most extensive clinical track record, but the acquisition cost is high
- US knee robotic-assisted surgeries 2020-2030 in units: the USA is by far the leading country for robotics usage. Knee surgery is the first target
- dustralia was always a pioneer in the use of innovations in orthopedics especially for knee robotic-assisted surgeries. Germany and Japan and France situations
- Robotic-assisted surgeries outside the US: Between 2024 and 2030, the number of robotic knee operations outside the USA
- What are orthopedic cases & trays?
- Cases & trays Contract Manufacturing market 2024
- Cases & trays Contract Manufacturing market 2012-2030 by product
- Cases & trays Contract Manufacturing top 15 market share in 2024: Tecomet, VIANT, Paragon, Avalign, etc.
- Ceramics Contract Manufacturing market 2024
- Ceramics Contract Manufacturing market 2012-2030 by product
- decramics Contract Manufacturing market share in 2024: Ceramtec, Kyocera, etc.
- Coating Contract Manufacturing
- Coating Contract Manufacturing market 2024
- Ocating Contract Manufacturing market 2012-2030 by product
- Ocating Contract Manufacturing market share in 2024: Orchid, Lincotek, DOT, Viant, APS Materials, etc.
- MPS Contract Manufacturing market 2024
- Marking Packaging & Sterilization –MPS- Contract Manufacturing market 2012-2030 by product
- Ontract Manufacturing market value chain
- Ontract Manufacturers worldwide orthopedics revenues in 2024 (in MUS\$)
- o CMO top players: 2017-2024 main M&A activity
- 7 Tecomet revenues by area and by customers 2019-2024
- Orchid revenues by area and by customers 2019-2024
- Viant revenues by area and by customers 2019-2024
- Avalign revenues by area and by customers 2019-2024
- 3 CMOs leader: presence in different services: forging, casting, machining, coating, instruments, cases & trays, and packaging
- OMOs leader: Tecomet, Orchid and Viant Strengths & Weaknesses
- Contract Manufacturing competitor ranking & dispersion
- Billing for Orthopedic instruments by geographical area and by players: Jabil, Intech, Tecomet, Arch, paragon, Avalign, Norwood, Autocam, Viant
- Orthopedic Contract Manufacturing concentration by acquisition
- Contract Manufacturing industry needs more concentration
- More outsourcing is a heavy trend for all the orthopedic companies: Outsourcing rate
- Ocontinuous trend: OEM facility disinvestments occur when there are opportunities to sell to a large and reliable player, who can guarantee supply security
- Depuy Synthes Jabil: strategic deal to disinvest 14 facilities: initial road map
- JABIL Healthcare profile
- OEM facility disinvestments: huge impact of Depuy Synthes Jabil deal for 2019-2020
- More outsourcing is a heavy trend for all the orthopedic companies



- 7 The risk of moving to LLC by 2030
- Contract Manufacturing price range dashboard in 2024
- Orthopedics Contract Manufacturing market is growing faster than In-house manufacturing
- Ontract Manufacturing market is growing at a higher rate than the orthopedic market
- Ontract Manufacturing market historical revenues & forecasts (MUS\$): 2012-2030

IV- 3D Printing in Orthopedics207

- 3D Printing & Trabecular in Orthopedics
- 3D Printing history in Orthopedics
- 3 Story of Zimmer and Trabecular Tantalum
- 3 Zimmer, Trabecular Metal related implants
- 3 DPrinting Manufacturing: Technologies and major competitors, EOS, SLM Solutions, Concept Laser (GE), Arcam (GE), Others
- Arcam EBM installed base for orthopedic industry: Lima
- Beijing AK MEDICAL EBM Installed base
- Illustrative build-up speed and resolution of selected Metal 3D Printing systems: EBM Vs Selective Laser Melting
- 3 Smith & Nephew usage of 3D Printing for customized cutting blocks
- 3 Stryker's History of 3D Printing: STRYKER, to build a 3D printing manufacturing facility for more than \$400 million
- 3 Stryker's current products made by 3D printing: Knee, cages, other
- Depuy Spine usage of 3D Printing for prototyping of complex surgical tools
- Depuy Synthes has acquired 3D Printing technology from Tissue Regeneration Systems Inc.
- 3 XILLOC invested usage for Cranio-Maxillofacial applications
- Equipment suppliers for Orthopedics, Installed base per customer and per supplier: EOS, ARCAM (GE), CONCEPT LASER (GE), SLM Solutions, 3D Systems, Trumpf and their customers
- Dozens of companies mentioned with the number of 3D printing machines and type of machines
- 3 Addressable market should increase with lower 3D Printing cost: cost and complexity curve linked with addressable market
- 3 Additive Manufacturing is attractive for reconstructive implants
- Number of implants produced using 3D Printing: Zimmer Biomet, Lima, Exactech, Adler Ortho
- FDA clearance for medical devices using 3D Printing in USA
- 3 3D Printing has reached the mass market for a few key products
- 3D Printing today has a slight impact on the forging, casting & machining of implants. Our research shows that Stryker and challengers are most advanced in the use of 3D printing, particularly for hip cups, tibial knee plates and spinal cages.
- 3D printing cages are gaining in market share over Peek and Titanium cages.
- 3D Printing in 2024
- 3D Printing impact on forging, casting & machining of implants
- Cages Raw Materials in the five main European countries: Peek, Titanium Vs 3D Printing
- Is 3D Printing the right option for the implant Contract Manufacturing business? Analysis for implants, standard cages, special cages and customized implants: players, products, benefits, drivers and limiters
- Js Additive Manufacturing the right option for the instruments Contract Manufacturing business? Analysis of customized cutting guides and instruments
- Analysis of one of the most advanced Contract Manufacturers in 3D Printing: Lincotek
- d Lincotek 3D Printing activity details
- Most large contract manufacturers are investing in 3D printing; Orchid, Lincotek, Marle, Paragon, Norman Noble and many others: detail of strategy of each
- The most manufactured orthopedic products by 3D Printing: cups, tibial knee, cages, shoulder glenoid,
- Standard manufacturing process Vs 3D Printing process: cost comparison in US\$
- Trend of the installed bases of the main machine suppliers: the number of 3D Printing machines used in orthopedics has grown by 25% per year since 2015: EOS, ARCAM, Concept Laser, 3D Systems, SLM, Renishaw, etc.
- 3D Printing In-house & Contract Manufacturing market: by products (hip cup, knee tibial, shoulder glenoid, spine cage, other): 2015-2030
- In-house and contract manufacturing market by customer: Depuy Synthes, Stryker, Smith & Nephew, Zimmer Biomet, Medtronic, other companies
- 3D Printing for orthopedics: Executive summary

V- Orthobiologics / Cobalt Chrome / Contract & Design Manufacturing Organization / ASC......242

- Use of antibiotics for orthopedic cements: Need for cements with new antibiotics
- 3 Synthetic or natural bone substitutes, allografts, must satisfy many needs: injectable substitutes or more abundant allografts
- Top bone grafts on the market: injectables and antibiotics are the main drivers
- Obalt Chrome is today used in many orthopedic products: femoral part of the knee, the cup in dual mobility and some hip heads, etc..
- Anti-allergic solutions against nickel, cobalt, etc. have been developed for several decades for a patient population considered to represent less than 10% of orthopedic operations.
- Ocntract & Design Manufacturing Organization Companies like Tyber and Resolve specialize in the design and development of implants and instruments for orthopedic companies.
- With the merger of Resolve and Tyber Medical with Intech the new group will dominate the CDMO market with projected revenues of over US\$300M in 2025
- 7 TOP 20 CDMO companies: Most of these companies are based in the US.
- 3 Ambulatory Surgery Center ASC forecast in the USA



VI- Impact of Inflation......253

- Ontribution to year-on year CPI (Consumer Price Index) inflation in the G7 countries July 2022
- Ocontribution to year-on year CPI (Consumer Price Index) inflation in the G7 countries September 2022
- Ocontribution to year-on year CPI (Consumer Price Index) inflation in the G7 countries October 2023
- Impact of inflation on the end-user market and on contract manufacturing (1/2)
- Impact of inflation on the end-user market and on contract manufacturing (2/2)
- FX rate variation from January 2018 to September 2024: The Euro has devalued by almost 20% Vs the US Dollar!
- Impact of exchange rate fluctuations on the major orthopedic companies: the Majors are impacted in terms of their revenues in Europe! Production will tend to relocate within Europe or to ROW
- Impact of exchange rate fluctuations on orthopedic contract manufacturers: Majors contract manufacturers are negatively impacted on their share of sales in Europe
- Worldwide orthopedic market 2000-2024
- 7 The Orthopedics Contract Manufacturing market is growing faster than In-house manufacturing 2000-2030
- Opportunities and risks for orthopedic end-user market
- Opportunities and risks for orthopedic contract manufacturing

VII- Contract manufacturing competitor ranking, Top 100 profiles and SWOT analysis of the leaders......266

Example of profiles:

