



avicenne
MEDICAL

INFORMATION FOR GROWTH

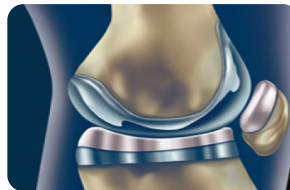
www.avicenne.com

Strategic Market Research & Transaction Services for the orthopedic industry

Avicenne Medical company profile



March 2026



CONTACT

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Scope

Coverage of key end-user segments

A US\$55+B Market

Hip



Robotics &
Navigation



Extremities
Trauma & Shoulder



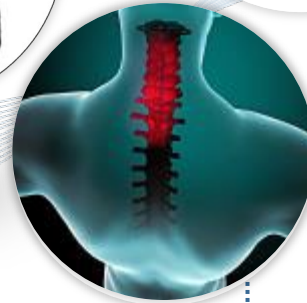
Biomaterials &
Raw-materials



Instruments,
Cutting tools,
Cases & trays,
Power tools



Spine



Knee



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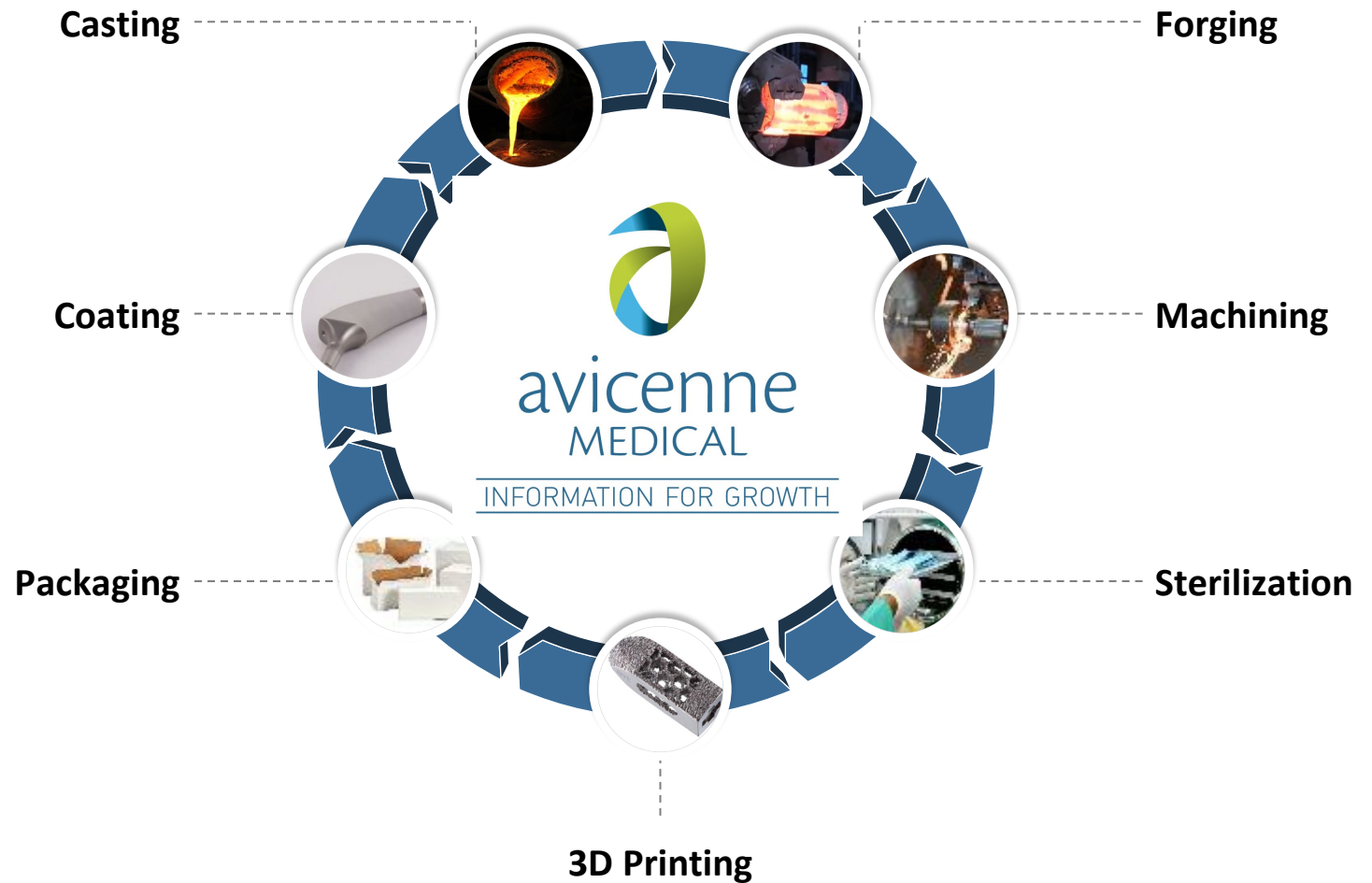
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Scope

Covering of the main contract manufacturing services

A US\$12+B Market

Our scope



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AVICENNE track record

Our history: Avicenne has been involved in most of the major deals in the orthopedic Industry

Strategic expertise in due diligence and build-up, with a long track record of successful transactions for our clients.



CONTACT

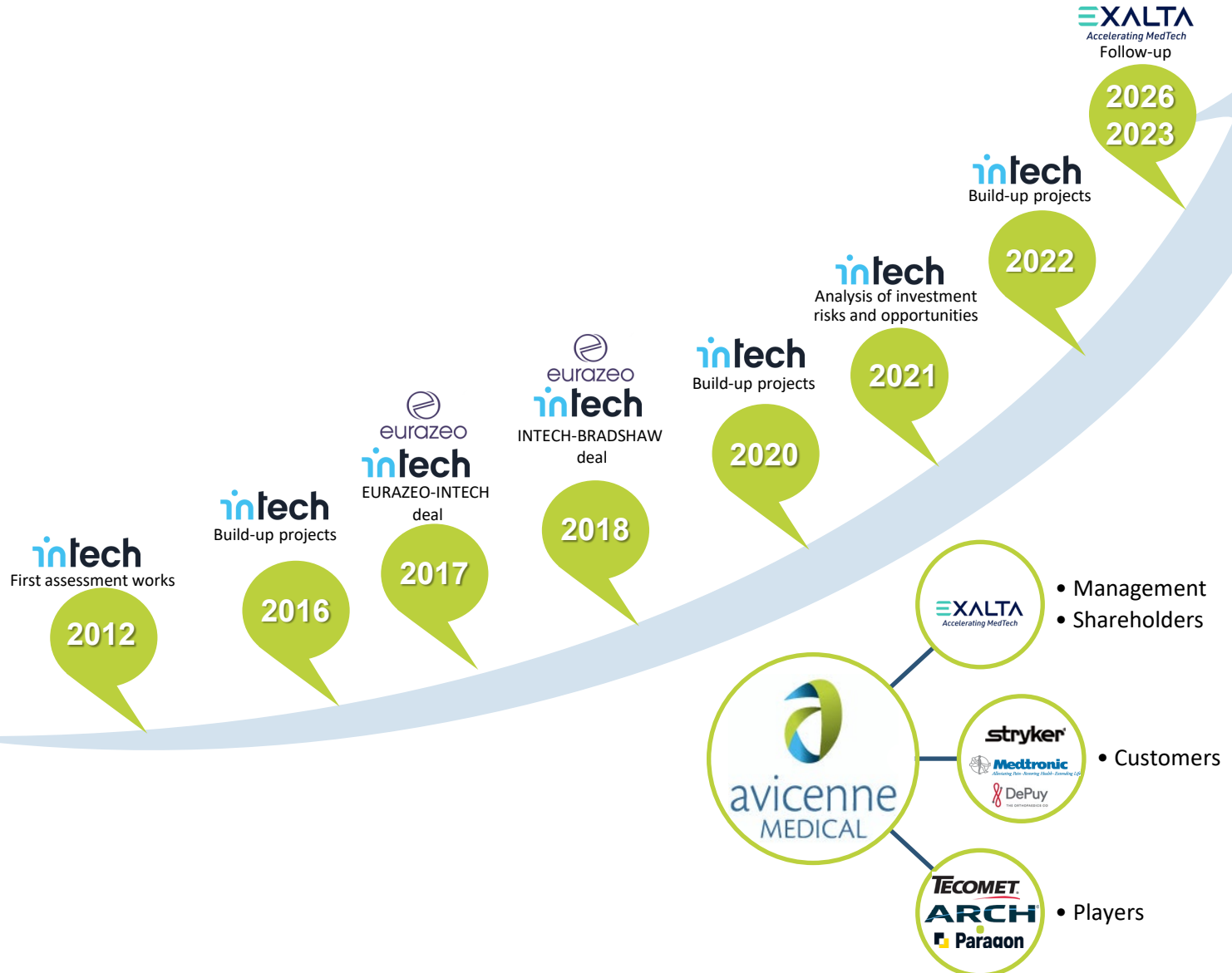
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Industry leaders have been analyzed and closely monitored for a very long time

Example of INTECH - EXALTA



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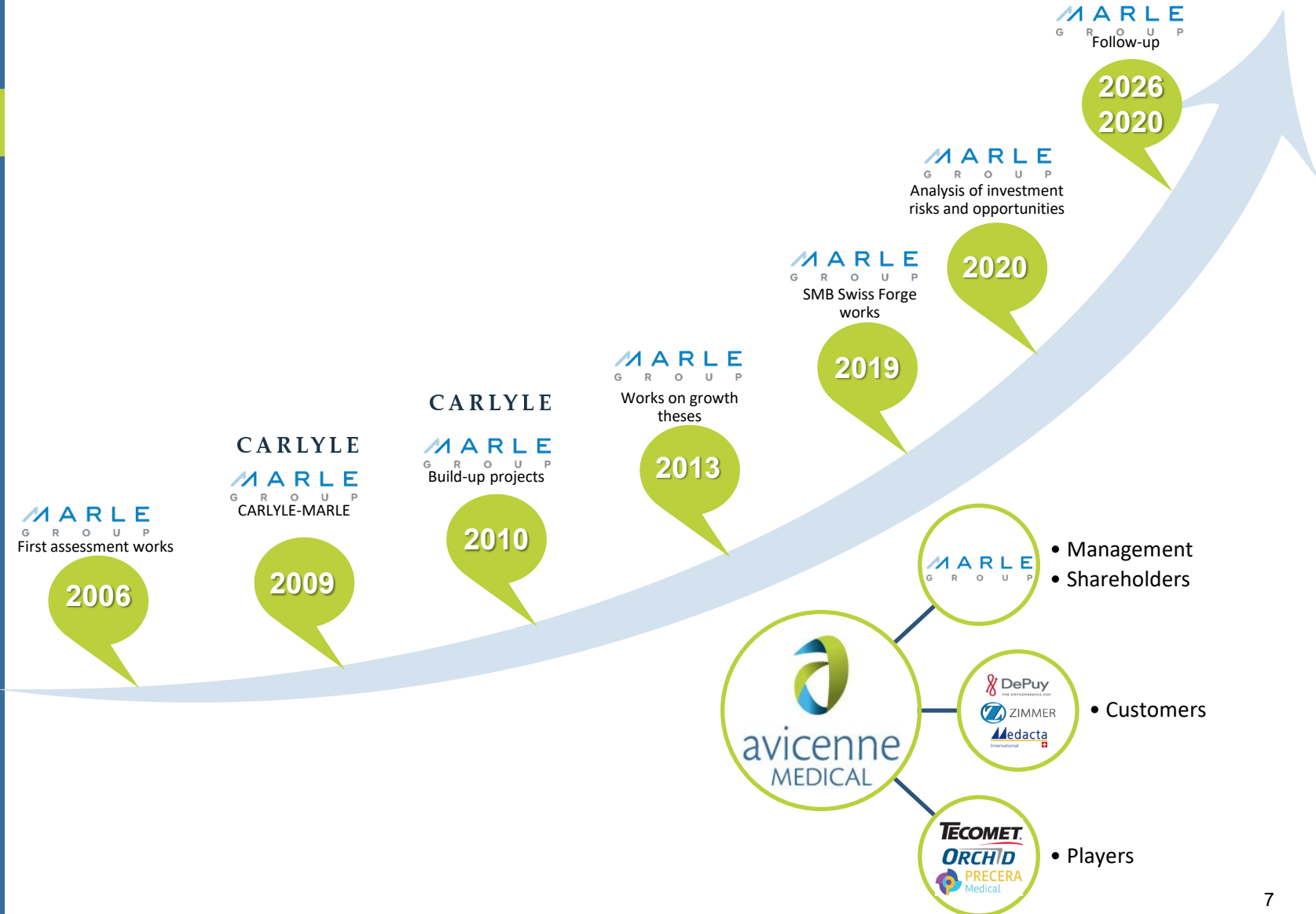
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Industry leaders have been analyzed and closely monitored for a very long time

Example of Marle



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AVICENNE track record

Medical device end-user market: Avicenne's long experience in due diligence and acquisitions in major European and US transactions

	End-user market				End-user market
	Orthopedics			Spine	Dental, Cardio, Neuro, Arthro, ENT & others
	Hip & Knee	Trauma & Extremities	Biologics	Fusion & non-fusion	
Avicenne presence	✓	✓	✓	✓	✓
Market size (2025)	US\$55+ bn			US\$10+ bn	US\$100+ bn
AVICENNE deal references					
1992-2025 number of deals carried out by AVICENNE	37	29	12	27	18
Targeted products					

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AVICENNE
track record

Medical devices contract manufacturing market: Avicenne's long experience in due diligence and acquisitions in major European and US transactions

Contract manufacturing market: implants, instruments & biologics

Manufacturing market

	Contract manufacturing market: implants, instruments & biologics				Manufacturing market
	Hip & Knee	Trauma & Extremities	Biologics	Spine	
Avicenne presence	✓	✓	✓	✓	✓
Market size (2025)	US\$10+ bn			US\$2+ bn	US\$20+ bn
AVICENNE deal references	 	 	 	 	
1992-2025 deals carried out by AVICENNE	38	24	10	35	22
Targeted products & services	 	 	 		

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Avicenne has a long track record of successful acquisitions on behalf of its clients



FH ORTHO GROUP

was acquired by

OLYMPUS

Avicenne advised the Buyer

November 2020  



TECOMET

was sold by

CHARLES BANK

Avicenne advised the Vendor

April 2013 



**DEMETRA
TECRES-OSARTIS**

was acquired by

ASTORG

Avicenne advised the Buyer

July 2021   



INTECH Medical

was acquired by

EURAZEO

Avicenne advised the Buyer

June 2017  



LIMA

was acquired by

ARDIAN

Avicenne advised the Buyer

September 2012  



Amplitude

was acquired by

APAX

Avicenne advised the Buyer

April 2011  



MARLE

was acquired by

CARLYLE

Avicenne advised the Buyer for build-up

April 2009  



MENIX GROUP

was acquired by

KEENSIGHT Capital

Avicenne advised the Buyer

April 2014  

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A diversified range of services

Based on over 30 years of medical device experience

Our services

Transaction Services

Strategic Market Research

Key Issues Review	Strategic & Commercial Due Diligence	Management team assessment	Target research & Build up	Customized Strategic research	Key Opinion Leaders surveys
Sizing and market dynamics	In-depth due diligence based on: Interviews with industry experts	Strengths & weaknesses of the management team	Screening & identification of potential targets	identifying diversification routes	Key Opinion Leader interviews for products and unmet needs
Detailed market analysis and company positioning	Product portfolio assessment	Identification of suitable candidates to strengthen management capabilities	Target evaluation	Distributor search	Survey on opportunities & risks of new product launches
Company's R&D capabilities	Manufacturing organization assessment		Analysis of the risks, complications and barriers	Geographical expansion	
Company differentiation & keys to market share growth	Routes to create value		Final selection of the appropriate targets	New Product evaluation & launch	Company reputation among surgeons and satisfaction survey
Review of the Business Plan	Opportunities & risks		Introduction & initial discussions	Global market share tracking for new products	

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Our team

Foundation of the company 1992

Orthopedics

Main activity

Headquarters

Paris



LinkedIn profile:



Ali MADANI

34 years with Avicenne
Dauphine University: MBA Technology & Innovation, Masters in Electrical & Electronics Engineering



Christophe PILLOT

33 years with Avicenne
Dauphine University: MBA Technology & Innovation



Jean-Philippe SALVAT

32 years with Avicenne
Masters in New materials & technology



Mike SANDERS









14 years with Avicenne
Delaware University: BS in Chemistry

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Strategic & Commercial Due Diligence (SDD & CDD) examples









Deal	Date	Area	Mission	Details
DEMETRA Worldwide Biologics leader	  2021	Europe USA Asia  	SDD for the buyer ASTORG	<ul style="list-style-type: none"> 🔗 Product portfolio assessment for combined AAP biomaterials & TECRES 🔗 Size and forecasts in the global orthopedic cement & spacer market 🔗 Dynamics & trends of 1-step Vs. 2-step surgeries, plus forecasts 🔗 Spacers used: molded vs. preformed & Antibiotic usage for preformed spacers 🔗 Segmentation, sizing and dynamics of vertebroplasty cements & instruments 🔗 Strengths and weaknesses of each company 🔗 Cement & Spacer growth drivers & limiters in the USA & Europe: infections, usage of preformed vs handmade-molded and 2-stage procedures, drivers of cement usage: revision, cemented and hybrid 🔗 Value creation: new products to launch, new sales area, M&A targets 🔗 Business Plan and forecasts
SPHINX TOOLS Main European Cutting Tools player	SPHINX+TOOLS 2022	Europe 	CDD for the buyer SANDVIK	<ul style="list-style-type: none"> 🔗 Orthopedic instrument segmentation & assessment: usage, number of pieces, price, weight, life cycle 🔗 Cutting tools & consumables for hip, knee, spine, trauma, characteristics 🔗 Cutting tools & consumables supply chain & distribution channels 🔗 Regulatory aspects and certification analysis: legacy & new products 🔗 Single-use trend 🔗 Cutting tool player strategic position analysis and business drivers & limiters 🔗 Risks of sourcing products in Low Labor Cost countries 🔗 Market by product and by player and forecasts by 2026 🔗 Value creation: New products to launch, new sales areas, M&A targets 🔗 SWOT analysis, Strategic and technological risks, business Plan and forecasts
LIMA Large European challenger	 2012	Europe USA, Australia  	SDD for the buyer Ardian	<ul style="list-style-type: none"> 🔗 Product portfolio assessment 🔗 Competitive advantages of the company in Italy, Germany, Spain, USA Australia, South Korea and Japan in terms of products, market share, image 🔗 Analysis of the company's distribution channels 🔗 Manufacturing organization assessment 🔗 New products, Business Plan and forecasts 🔗 Analysis of the company's management capabilities to sustain growth 🔗 Support in finding the new company CEO 🔗 R&D projects pipeline for the next 5 years 🔗 Working Capital benchmarking 🔗 Management case discussions & restatements by segment 🔗 Profitability assumptions and analysis 🔗 Report and Q&A for debt suppliers

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



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Strategic & Commercial Due Diligence (SDD & CDD) examples

Deal	Date	Area	Mission	Details
IN'TECH Worldwide leader in spine instruments, 66% of its sales generated in the US	 2017 2021	USA Europe Asia  	SDD for the buyer EURAZEO	<ul style="list-style-type: none"> 🔗 Market sizing and dynamics of customized instruments 🔗 Instruments life cycle demand, drivers & limiters 🔗 Customized & adapted product portfolio analysis 🔗 OEMs' manufacturing strategies & Contract manufacturing price pressure 🔗 OEMs' relationships with their suppliers - Criteria for choosing a CMO 🔗 Manufacturing organization analysis, Capex analysis, Regulatory & Quality department assessment 🔗 Routes to diversification, potential M&A targets & upsides 🔗 Technological & strategic risks, competitive risks and Business Plan analysis 🔗 Investment rationale, opportunities & risks
AMPLITUDE Top Challenger with strong export Knee, hip, extremities	 2011	Europe USA  	SDD for the buyer APAX Partners	<ul style="list-style-type: none"> 🔗 Product portfolio assessment 🔗 Positioning on existing markets: France, Germany, Italy, Spain, Austria,.. 🔗 Geographic expansion opportunity analysis: USA & Japan 🔗 Other countries upside analysis: Brazil, Middle East, India 🔗 Distribution channel capabilities & risks: external agents Vs internal sales force 🔗 Company-surgeon relationships analysis 🔗 New products pipeline & IP assessment 🔗 Business Plan forecasts: current products, new opportunities and build-up scenarios 🔗 Opportunities & risks of acquisition
TECOMET Creation of the worldwide leader in Orthopedic Contract Manufacturing	 2013	USA 	Advised the owner Charles Bank Capital	<ul style="list-style-type: none"> 🔗 Size and Forecast of the global orthopedic markets by country and by product - with competitors' market shares 🔗 Reimbursement procedures, trends and impact on the target business 🔗 Outsourcing strategies and trends of orthopedic companies 🔗 Segmentation, sizing and dynamics of contract manufacturing by capabilities + the market share details of the top 20 contract manufacturers 🔗 Risks and opportunities of relocating implant manufacturing to BRIC countries 🔗 Rating OEMs' criteria in choosing their Contract Manufacturers 🔗 Understanding company differentiation & keys to growing market share 🔗 Strategic & operational recommendations: ways to maximize value

Examples of Strategic market research, diversification, market share tracking and acquisition target assessment

Deal	Date	Area	Mission	Details
LISI Group				
Strategic advice for entering orthopedics	2011	  	Strategic advice for diversifying in orthopedics. Goal: reach US\$100 M in revenues in 5 years	<ul style="list-style-type: none"> Analysis of Orthopedics contract manufacturing by segment: forging, casting, machining, coating, etc.. Drivers and limiters for each segment and focus on several opportunities Analysis of the dental implants market worldwide Acquisition opportunities analysis in Europe and the USA Business Plan scenarios: analysis & restatements Road map for the next 5 years
Several projects (Confidential)	2014	 	Find & assess appropriate targets for acquisition, strategic analysis of risks and opportunities	<ul style="list-style-type: none"> Selection of 10 to 20 acquisition targets with defined criteria: <ul style="list-style-type: none"> Serving the Orthopedics OEMs & CMOs in various areas Capabilities in innovation with strong R&D and quality departments Prototype, metrology, testing, machining, cleanroom class III, packaging, competencies Financial perimeter: US\$10 M – US\$150 M revenues, level of profitability, etc.
Identification acquisition targets	- 2024	      		<ul style="list-style-type: none"> Analysis of the risks, complications and obstacles Final selection of the appropriate targets Opening channels of communication with the targets
Medtronic				
Market shares tracking for 50 spine products	Over a 4 years period	 	Market share tracking for 50 emerging products launched by competitors	<ul style="list-style-type: none"> Quarterly market shares tracking in 14 European countries for different spine products Perimeter: Stabilization, Dynamics, Orthobiologics & Vertebroplasty with 13 sub-segments in detail Tracking of devices sold, by unit & value Assessment of players' product portfolio Forecasts and trends to identify the future high growth products

Examples of customized client projects

Strategic market research & build-up

- 🕒 Building a **diversification strategy** for an aerospace group entering the orthopedics contract manufacturing market: target US\$100 M in 5 years
- 🕒 **Search for distributors** for a variety of orthopaedic products: Europe, USA, China, Japan, Australia
- 🕒 Several **build-up & acquisition target researches** for orthopedic challengers and contract manufacturers
- 🕒 Strategy for **market share growth and build-up** for the leading European Orthopedics contract manufacturers
- 🕒 **Market shares tracking** for the sub-segments of the Spine market (tracking > 50 products) for a major orthopedic leader
- 🕒 Routes to growth for a European **coating supplier**
- 🕒 Identifying growth opportunities for a **bone graft** market leader
- 🕒 Research on **Navigation, Robotics & Devices**, worldwide market for knee, hip and spine
- 🕒 Study of the **raw material** needs of OEMs and CMOs in Orthopedics for a leading raw material distributor
- 🕒 **Dual mobility hip cups** growth and penetration in Europe, USA, and Japan for a Major orthopedic company
- 🕒 Advice on partner identification and **technology transfer** to a Middle East orthopedic OEM
- 🕒 Geographic expansion opportunities on the **cases & trays** segment for a leading European company

Key Opinion Leader surveys

- 🕒 **Key Opinion Leaders'** usage and preferences for certain orthopedic product designs in Germany, Spain, France and UK
- 🕒 **Surgeon survey** in USA & Europe concerning the hip dual mobility cups usage and trends
- 🕒 Opportunities & risks of **launching a new knee system** for a European challenger
- 🕒 **Cutting tool** market analysis for a leading worldwide supplier of cutting tools

Competitive & Technology monitoring

- 🕒 Value of **patient specific cutting guides** for knee joint replacements
- 🕒 **Additive Manufacturing**: the new challenge to manufacture orthopedics implants and instruments
- 🕒 Is **Robotics a game changer** for orthopedics?
- 🕒 Worldwide Orthopedic **patents watch** focused on hip, knee, trauma & orthobiologics for several companies

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Our methodology

The Commercial & Strategic Due Diligence Framework

Executive Summary

- Describe major findings of Due Diligence – focus on “Red Flag issues”
- Provide overview of findings for other components
- Description of analysis scope, what has been investigated, and Due Diligence focus areas
- Includes info on the sources used and interviews conducted

6 areas of assessment covered

Market Analysis	Competitive Environment	Analysis of Business Model	Analysis of Investment Case	Upside & Build-up Opportunities	Exit Options
<ul style="list-style-type: none"> Market analysis to form a perspective on the risks and opportunities of the acquisition Definition of the immediate and broader market + assessment of its attractiveness 	<ul style="list-style-type: none"> Understanding and assessing the competitive landscape to determine the relative strength of the target company, its unique Selling Points and sustainability Assessment of Product portfolio and pricing strategy, customer satisfaction, Regulatory issues & likelihood of overcoming competitive threats 	<ul style="list-style-type: none"> Perspective on attractiveness and robustness of the business model Analysis of past and projected performance as well as capabilities of target company 	<ul style="list-style-type: none"> Perspective on management’s assumptions and further improvement potentials Assessment of management’s base case, + identification and assessment of reasonable further improvements - as well as downside risks 	<ul style="list-style-type: none"> Perspective on value creation potential beyond investment case assumptions – “investment case at time of exit” Identifying and quantifying further value creation levers that could be achieved during holding period 	<ul style="list-style-type: none"> Perspective on exit opportunities after holding period Assessment of industry consolidation opportunities and evaluation of potential strategic and financial buyers

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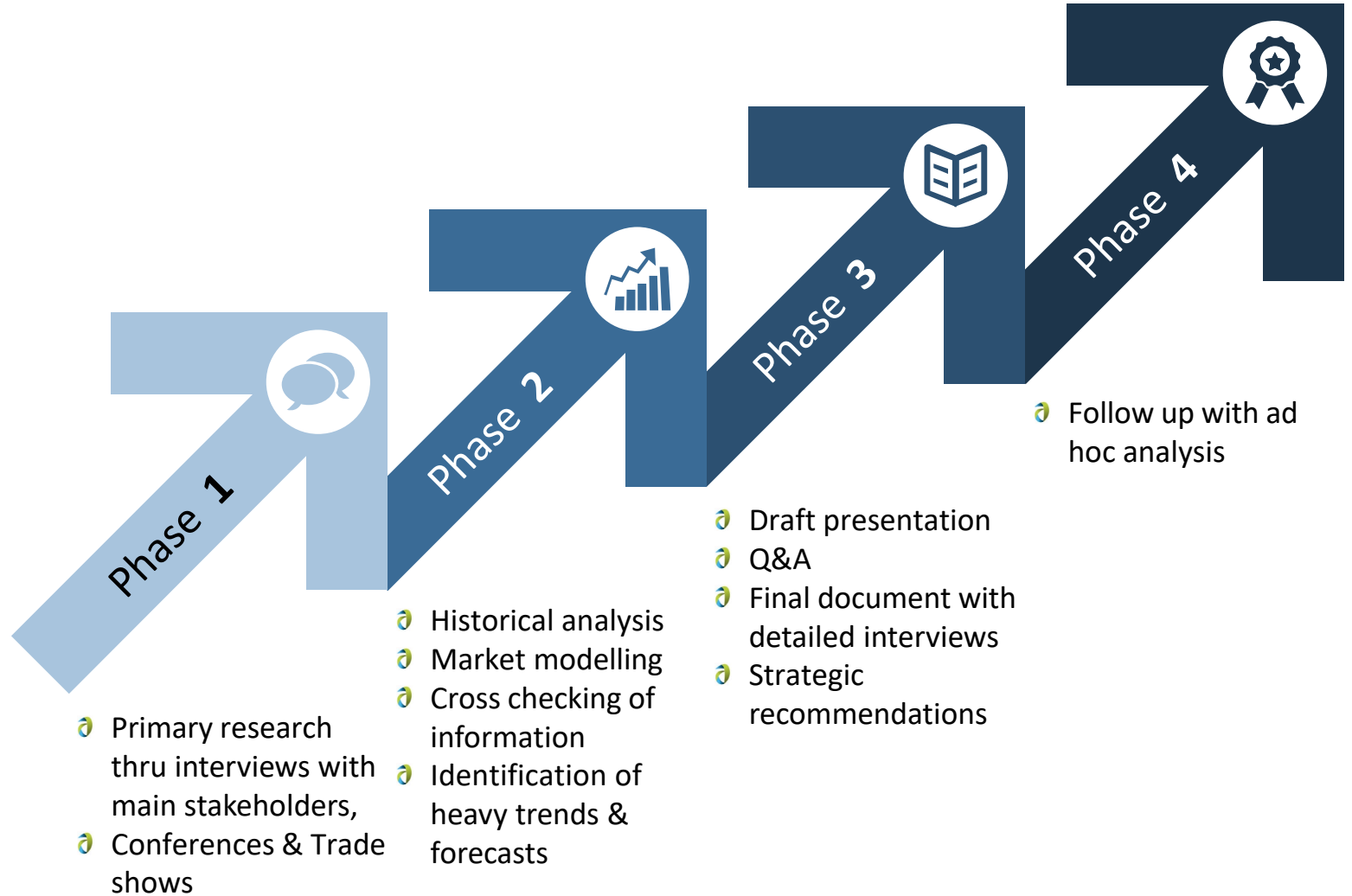
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Our
methodology

Our methodology



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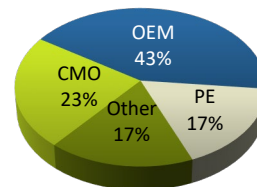
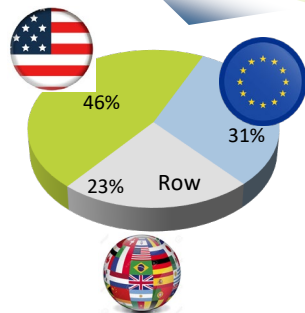
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Our methodology

A dense network built over 30 years

Our Orthopedic database:
40,000+ qualified contacts



Our Orthopedic database:
full coverage of the orthopedic top
players & their decision makers



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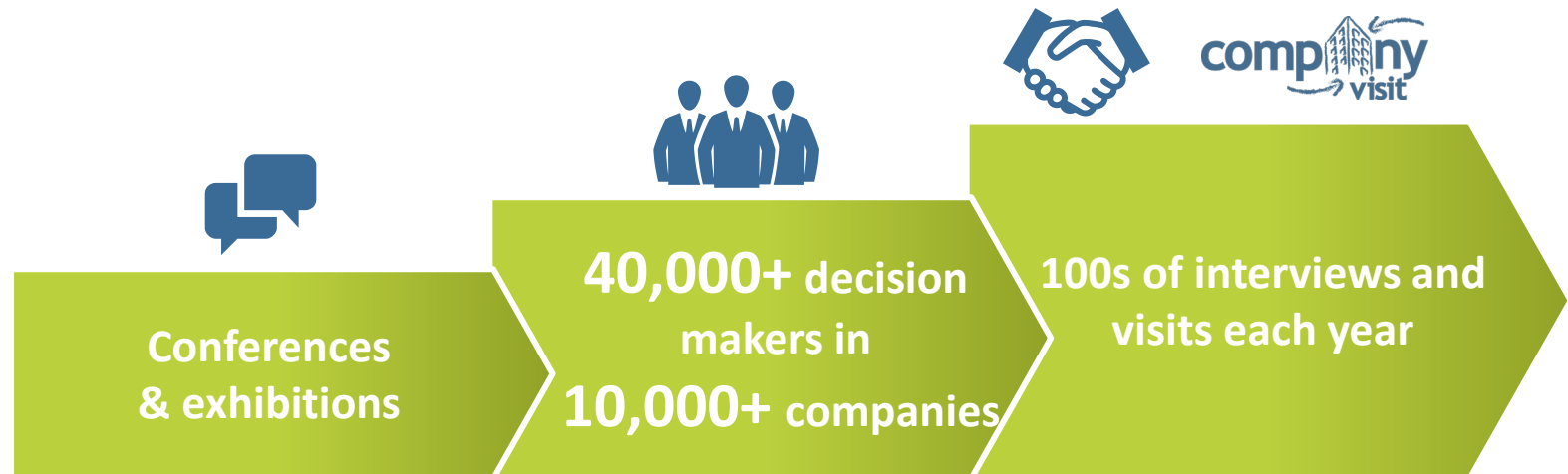
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Our methodology

Direct interviews & company visits



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Ali Madani, world-renowned medical device expert and speaker at international conference

Ali Madani is speaker, chairman and workshop moderator of 15+ international conferences worldwide each year.



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Our
methodology

IMPLANTS conference

The international meeting on innovations & solutions for orthopedic implants & orthobiologics, chaired by Avicenne, attracts 300+ decision makers. It is both a place to take the pulse of the industry and a key networking event.

Founded and chaired
by AVICENNE since **2005**

<http://www.implants-event.com>



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Our customers

Aesculap-B Braun, Amplitude, Aston Medical, Bioland, Biomet, Biomicon, Carl Zeiss, Ceraver, Cousin-Biotech, Dediene, Depuy Synthes, Eurospine, Evolutis, Exactech, FH, FX Solutions, Geistlich, Help Ortho, Implanet, Implant Industries, Integra Life Sciences, Kisco International, Lepine, Lima Corporate, Mathys, Medtronic, MBA Surgical, Medacta, Meril Life Sciences, Nexis, Olympus Corporation, OST, Ortho Baltic, Orthosoft, Ossacur, Osteotech, Plus Ortho, Progenor, SEM, Seremm, Scient'x, Smith & Nephew, SME, SMI, Stryker Corp, Stryker Limerick, Stryker Spine, Spineway, SGM-Codim, Stanmore Implants, Stryker, Summit Medical, Surgical Devices Pty, Symbios, Tornier now Wright Medical, Transtructure, Transysteme, Zimmer Biomet, Wright Tornier, X'Nov...

Advent, All invest, Apex Partners, Altor Equity Partners, Alpha Associés Conseil, Astorg Partners, Apollo Global Management, Ardian, Argos Soditic, Astorg, Banque Lazard, BC Partners, BIP Investment Partners, Capza, Carlyle Group, Charterhouse, Chequers Capital, Charlesbank Capital, Clayton Dubilier & Rice, CM-CIC Investissement, CVC Capital Partners, EKKIO Capital, EMZ Partners, Essling Capital, Eurazeo PME, European Capital, Goldman Sachs, HSBC, ISALT Gestion, Keensight Capital, Kinsella Group, LBO France, LGT Capital Partners, NATIXIS Partners, Novalpina Capital, Oaktree Capital, PAI Partners, Perella Weinberg, Permira, Piper Jaffray, Piper Sandler, Pragma Capital (now Sparring Capital), Rothschild Five Arrows, Simuval, TechLife Capital, Tikehau, Tinicum, UI Gestion, Warburg Pincus, Zurmont Madison...

Alltec GmbH, Autocam Medical, Acnis international, Addup Solutions, Avalign Technologies, AV&R, Caplugs, Ceramtec, Cetim, EOS, Element Materials, Eurocoating (now Lincotek Medical), Finetubes, Forginal, GF Machining, Geoffroy, Integer-Greatbatch now Viant, HWG, Intech, Inomed Technology, Invibio Victrex, Ionbond, Jabil Medical, Jenoptik, Heptal, Komet, LISI Medical, Manoir Industries, Marle, Medical Group, Mediliant, Medin Technologies, Metal Craft & Riverside, Mitsui Chemicals, MW industries, Nowak, Nypro, Oerlikon, One Ortho, Orchid Orthopedic Solutions, Osartis, Paragon Medical, PolymerExpert, Projection Plasma System, RTI Surgical, Sandvik, Seabrook Medical, Seco Tools, Stainless, Straits Orthopedics, Somepic, Surgical Devices Pty, Symmetry Medical, Tecomet, TE Connectivity, Teknimed, Terolab Surface Medical, Vaccucast, VSMPO Tirus, Wichard, Willemin Macodel, Zollern,...



Arthur D. Little, AT Kearney, Alvarez et Marsal, Bain & Company, Boston Consulting Group, BC Partners, Health Advances, KPMG Strategy, LEK Consulting, McKinsey & Company, OC&C Strategy, Oliver Wyman, PWC, Roland Berger...

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Benefits of collaborating with AVICENNE

Strategic & operational consulting in the orthopedic industry since 1992 and strong relationships with key decision makers

Guaranteed Confidentiality & Strong Ethical Standards: A Core Value

Global coverage of the entire industry value chain:

- 📍 OEMs, contract manufacturers as well as surgeons, research labs, experts, etc.
- 📍 Areas:
 - 📍 North America: USA, Canada
 - 📍 Europe: France, Germany, UK, Italy, Spain, Switzerland, Belgium, Austria, The Netherlands, Portugal, Nordic Countries, Eastern Europe
 - 📍 Asia Pacific: Japan, Australia, South Korea
 - 📍 Emerging Markets: Brazil, Russia, India, China, Latin America, Middle East, Africa

Clear methodology, results and recommendations

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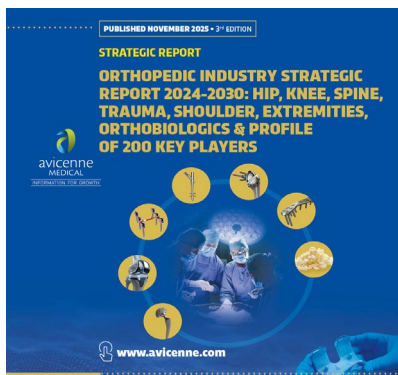
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AVICENNE's off the shelf market reports

“Orthopedic Industry Strategic Report 2024-2030: Hip, Knee, Spine, Trauma, Shoulder, Extremities, Orthobiologics & Profile of 200 key players”
November 2025- 3rd edition

- 🕒 Orthopedic macro environment, drivers & limiters
- 🕒 400 pages & 600+ graphs & exhibits
- 🕒 Orthopedic market by region: orthopedic players' ranking & dispersion for hip, knee, spine, trauma, shoulder, extremities & orthobiologics
- 🕒 Player strategies & dynamics: split by product for each player, main facilities for the Major with their core business
- 🕒 6 Majors analysis: Zimmer Biomet, Depuy Synthes, Stryker, Smith & Nephew, Medtronic, Globus
- 🕒 70 North America Challengers: Enovis, Arthrex, Conmed, Advita, Centinel spine, etc.
- 🕒 73 European Challengers: Aesculap, Link, Medacta, Corin, Amplitude, Spineart, etc.
- 🕒 51 Asian & Latin America Challengers: Microport, United, AK Medical, Teijin Nakashima, etc.
- 🕒 Profile of 200 key players in total



Available

“Worldwide Orthopedic & Spine Contract Manufacturing market report 2025-2030 & Top 100 supplier profiles”
March 2026 -15th edition

- 🕒 First published in 2014
- 🕒 400 pages & 1,000+ graphs & exhibits
- 🕒 OEMs' strategy for outsourcing & in-house manufacturing
- 🕒 Detailed markets & sizing for:
 - 🕒 Forging: hip stem, hip cup, femoral knee...
 - 🕒 Casting: femoral knee, tibial knee, hip cup...
 - 🕒 Hip, knee machining & finishing
 - 🕒 Spine, trauma & shoulder machining & finishing
 - 🕒 Instrument manufacturing
 - 🕒 Cases & trays manufacturing
 - 🕒 3D printing: spine cages, hip cups,.
 - 🕒 Coating: stem, cup, femoral, tibial
 - 🕒 Ceramics: hip heads, hip liner
 - 🕒 Cleaning & packaging...
 - 🕒 Special focus on robotics usage for orthopedics, Co-Cr alternative solutions, destocking & FX impact
- 🕒 Ambulatory Surgery Center: recent data and market impact
- 🕒 Top 100 Contract manufacturers detailed profiles



Available March 2026

“European Orthopedic Market 2021-2026”
Hip, Knee & Shoulder
September 2022 - 19th edition

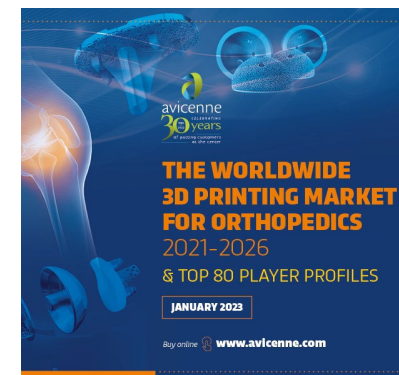
- 🕒 First published in 1993
- 🕒 860 pages & 1,550+ graphs & exhibits detailing the European Market in Germany, France, Italy, Spain, UK, and other countries
- 🕒 Up-dated yearly
- 🕒 Hip, Knee and Shoulder
- 🕒 Based on 100+ interviews
- 🕒 Special focus on the worldwide orthopedic market, player dynamics and global market shares
- 🕒 Analysis of the drivers & limiters of the market, price pressure and regulatory trends, MDR impact in Europe. Comprehensive analysis of the key companies
- 🕒 Impact of COVID in orthopedic markets: 2020, 2021 and beyond



Available

“Worldwide 3D printing for orthopedics 2021-2026 & player profiles”
January 2023 - 2nd edition

- 🕒 First published in 2018 – January 2023, 2nd edition
- 🕒 Market for 3D Printing for Orthopedics and forecasts in 2026
- 🕒 Market for hip cups, tibial knees, glenoid shoulders, spine cages and other products made by 3D printing
- 🕒 Based on 50+ interviews of:
 - 🕒 3D printing machine suppliers
 - 🕒 Contract Manufacturer leaders in 3D printing
 - 🕒 Orthopedic companies operating in 3D printing
 - 🕒 Other Contract Manufacturers operating in 3D printing
- 🕒 Top 80 detailed players



Available

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