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PUBLISHED APRIL 2024 • 13TH EDITION

THE WORLDWIDE ORTHOPEDIC & SPINE CONTRACT MANUFACTURING MARKET REPORT 2023-2030

& TOP **100** SUPPLIER PROFILES

U • P • D • A • T • E • S

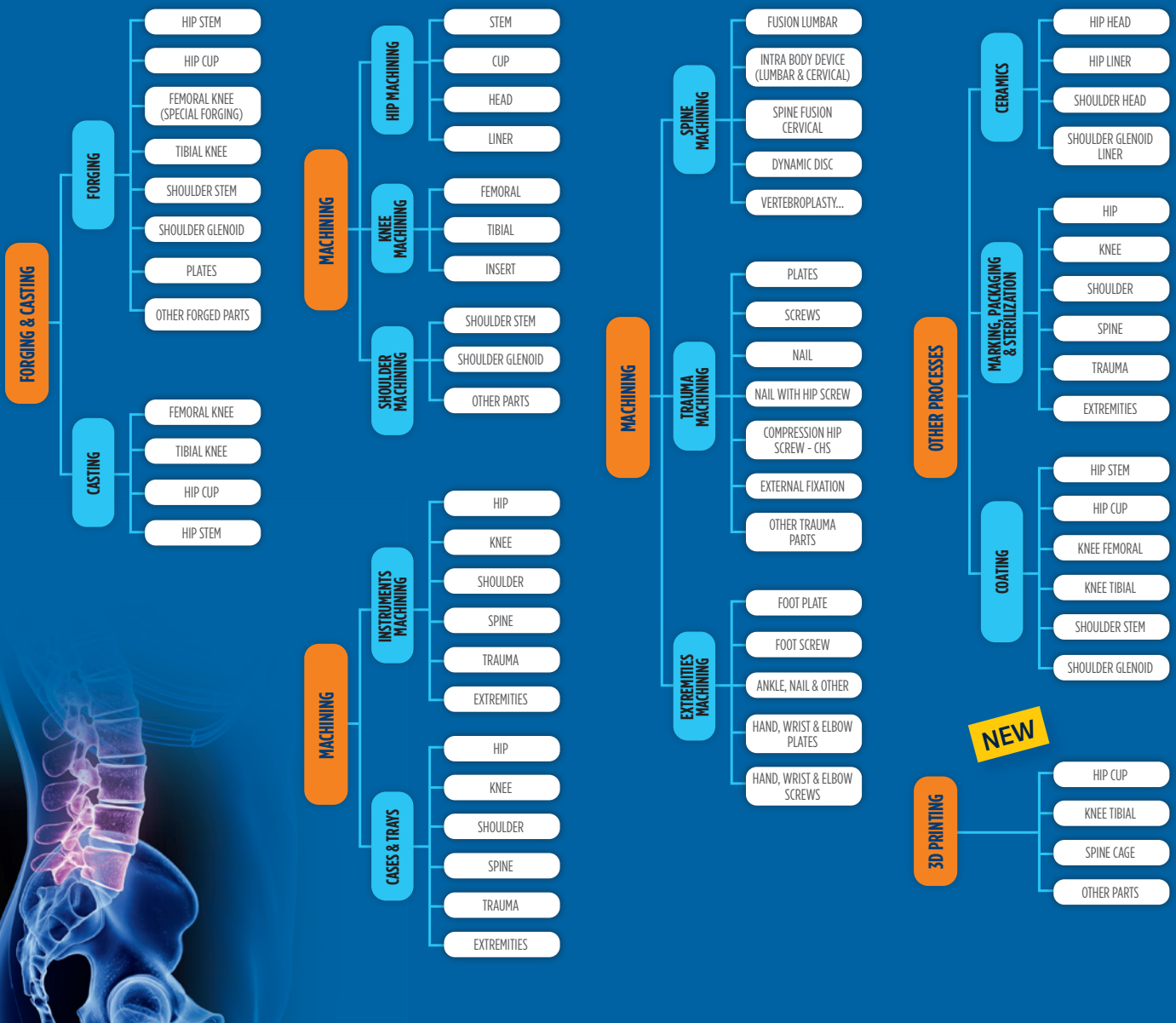
- Complete overview of the **orthopedic end-user market:** markets, prices, players, strategic trends & moves
- **Spine, Trauma, Extremities and Shoulder** contract manufacturing, detailed and separate analyses
- **Inflation:** Impact on the contract manufacturing business and the orthopedic end-user 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?
- **Ambulatory Surgery Center:** The rise of ASC in USA and impact on instruments & implants design and manufacturing
- A plethora of strategic information on the **Top 100 contract manufacturers, & SWOT analysis** with 140 profiles - including those of acquired companies



www.avicenne.com/medical_reports_2.php

"WHERE IS GROWTH ?" IN-DEPTH ANALYSIS COVERING 14 SEGMENTS / 70 SUB-SEGMENTS ON THE US\$11B WORLDWIDE ORTHOPEDIC CONTRACT MANUFACTURING MARKET

Contract Manufacturing segmentation: 14 segments & 70 sub-segments



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

For each of the Major 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, etc.
- In-house Vs Contract Manufacturing volumes per product for forging, casting, machining, 3D printing, coating, instruments, cases & trays, etc.

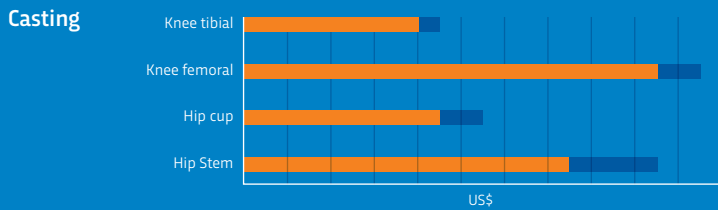
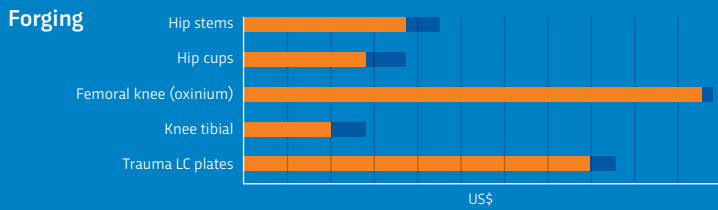


All other Challengers

3

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.



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UNDERSTAND COMPETITION DYNAMICS WITH MARKET SHARES & COMPANY DATA

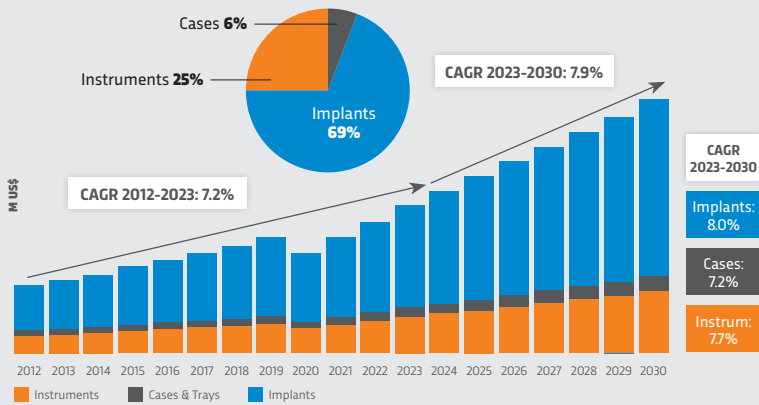
AVICENNE provides four main data components:

- 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:** Jabil, Tecomet, Orchid, Viant, Lisi, Avalign, Marle, Norman Noble, PCC, Paragon, Spitrex, etc. (70+ companies mentioned)
- **Instruments:** Jabil, 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, 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 manufacturing, etc.

5

IDENTIFY CONTRACT MANUFACTURING MARKET TRENDS WITH VALUE FORECASTS TO 2030

The Contract Manufacturing market will grow by 7.9% a year by 2030, a higher rate than the orthopedic market: 5.0% a year. Main drivers for this faster growth: **1** - Growth in orthopedic company outsourcing rate **2** - Inflation **3** - Facility disinvestments



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CONTRACT MANUFACTURING COMPANY RANKINGS & TOP 100 SUPPLIER PROFILES

Example of profile:

JABIL Healthcare

CONTACTS & MANAGEMENT: 10, Address: ... 2, ... 3, ...

HEADQUARTERS: 200,000 employees in total worldwide, 1,000 for the US.

PRODUCTION FACILITIES: 1, ... 2, ... 3, ... 4, ... 5, ... 6, ... 7, ... 8, ... 9, ... 10, ... 11, ... 12, ... 13

2023 JABIL REVENUES (\$4.78B USD): Implants, Instruments, Cases & Trays, Coating, 3D Printing, Additive Manufacturing, Other

ACTIVITIES: Manufacturing, Logistics, Distribution, Sales & Marketing, R&D, Regulatory Affairs

MAIN SERVICES: Manufacturing, Assembly, Packaging, and the most... **MAIN PRODUCTS:** Bone & Bone Replacements, Instruments, and the most... manufactured

2023 JABIL ORTHO REVENUES (\$1,800 M): Implants, Instruments, Cases & Trays, Coating, 3D Printing, Additive Manufacturing, Other

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 the creator of IMPLANTS, a worldwide conference focusing on Strategy, Innovation & Regulatory in the orthopedic industry. 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

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

avicenne CELEBRATING 30 years of putting customers at the center

Primary research: OEM & Contract Manufacturer direct interviews with decision makers thanks to strong links with CEOs, R&D, Marketing, Sales...

Secondary research: 30+ years of historical data on the Orthopedics & Contract Manufacturing markets

Full value chain coverage: Entire supply chain & all players: OEMs, Contract Manufacturers, etc. All product types: implants, instruments, cases & trays, biologics, cements, ceramics. All manufacturing services: forging, casting, machining, coating, packaging, sterilization.

Worldwide coverage: Developed countries (Western Europe), BRICS countries, Other countries (Latin America, Middle East, Asia...)

A 360° view of Orthopedics

Operating Models & Cross-checking of information: Primary research, Secondary research, Cross-checking of information thanks to our field & tested operating models.

Highly detailed segmentation: Companies & markets, continuous tracking + detailed market and financial modeling.

ORDER FORM

WORLDWIDE ORTHOPEDIC & SPINE CONTRACT MANUFACTURING MARKET REPORT 2023-2030 & TOP 100 SUPPLIER PROFILES

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MAIN REPORT

Worldwide Orthopedic & Spine Contract Manufacturing Market Report 2023-2030 & Top 100 supplier profiles

400+ pages

€4,900

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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 350 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.

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