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3D printing market & Technologies for orthopedics 2025-2030 & TOP 100 player profiles



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Section V includes 100 individual player profiles: 35 orthopedic OEMs, 20 CMO leaders, 25 CMOs operating in 3D printing and 20 machine suppliers. Detailed contents of each section on the following slides.



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3D printing market & Technologies for orthopedics 2025-2030 & TOP 100 player profiles

Important notice, Aim of the Survey, Table of contents

I – Summary & methodology (p. 8)

- Executive summary: 3D printing market & Technologies for orthopedics 2025-2030
- Methodology

II – Orthopedic environment (p. 10)

- Contract Manufacturing market value chain
- Orthopedics macro environment: Political, Economical, Social/Culture, Technological, Environment, Legal & Regulatory
- Market Drivers
 - Global population growth 1950-2050 and people over 65
 - The market drivers
 - Demographic & Economic
 - Orthopedics is generally risk-averse with few disruptive innovations, many small incremental innovations
 - Innovation and new products pull the market
 - Innovative surgeons are looking for new products, % of the surgeons by category in each type of country
- The market limiters
 - Regulatory & Certification
 - Reimbursement and pricing regulation
 - MDR (Medical Device Regulation): Impact in Europe
 - A product CE marked under MDD will 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 date: details
 - Hip price trends in Europe show regular decrease
 - Reimbursement price decreases are not frequent; hence they have been manageable over the long term
 - Hip ASP erosion in developed countries
 - Knee ASP erosion in developed countries
 - Hip average price trend in Europe 2003-2025: France, Germany, UK, Italy, Average Europe
 - Price erosion forecast 2025-2030: USA, Australia, Japan, France
 - Reimbursement hip average price trend in Europe (€), including country disparities
 - Regulatory, Certification
 - Group purchasing in Germany, France and Italy
 - The orthopedic sales channels

III – History of 3D printing for orthopedics, segmentation and addressable markets (p. 29)

- History of Orthopedic 3D Printing
- Story of Zimmer and Trabecular Tantalum
- 3D Printing is attractive for reconstructive implants to accelerate and improve osteo-integration
- Zimmer, Trabecular Metal related implants
- Zimmer Biomet uses both Trabecular Metal and 3D printing technologies
- FDA clearance for medical devices using 3D Printing in the USA
- Metal 3D Printing: technologies and major players, EOS, Arcam, Nikon-SLM Solutions, Concept Laser, Other
- Illustrative build-up speed and resolution of selected Metal 3D Printing systems: EBM vs. Selective Laser Melting
- Addressable market should increase with lower 3D Printing cost
- Metal Binder Jetting

IV – 3D printing for orthopedics: players, strategies, 2025 market and forecast by 2030 (p. 39)

- Lima – Enovis: 3D Printing activity details
- Beijing AK Medical: 3D Printing activity details
- Implantcast: 3D Printing activity details
- Smith & Nephew uses 3D Printing for metal and for plastic to produce hip cups & customized cutting blocks
- Stryker has announced massive investments in 3D Printing
- Stryker current products made by 3D printing: knee, cages, other
- Lincotek 3D Printing activity details
- Depuy Spine uses 3D Printing for prototyping complex surgical tools
- Depuy announced investments of US\$41M in 3D printing in January 2019 & launched knee 3D printing in March 2022
- DePuy Synthes has acquired 3D printing technology from Tissue Regeneration Systems Inc.
- DePuy Synthes launched 3D printed titanium facial reconstruction implants in the U.S.
- XILLOC invested in EOS machines for cranio-maxillofacial applications
- Is 3D Printing the right option for the Contract Manufacturing business? Analysis of one of the most advanced Contract Manufacturers in 3D printing
- Most large contract manufacturers are investing in 3D printing and, after an initial learning curve, are moving into the scale-up phase. The strategic question for CMOs: will 3D Printing technology be kept in-house by OEMs?



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3D printing market & Technologies for orthopedics 2025-2030 & TOP 100 player profiles

IV – 3D printing for orthopedics: players, strategies, 2025 market and forecast by 2030 (cont.)

- Equipment suppliers for orthopedics, 3D printing machines installed base per customer and per supplier: EOS, Arcam, Concept Laser, Nikon-SLM Solutions, 3D Systems, Renishaw, other and their customers
- Trend of the installed bases of the main machine suppliers: the number of 3D printing machines used in orthopedics 2015-2025 for EOS, Arcam, Concept Laser, 3D Systems, Nikon-SLM, Trumpf, Renishaw, other
- 3D printing contract manufacturing market share by player in 2025: four market leaders share one-quarter of the market; the next 16 companies share another quarter; and the next 20 companies only 10%
- The most popular orthopedic products manufactured using 3D printing: hip cups, knee tibial plates, spine cages and shoulder glenoids
- Is 3D Printing the right option for the implant Contract Manufacturing business? Analysis of different products & players for reconstructive implants, standard cages, special cages and customized implants
- Is 3D Printing the right option for the instruments Contract Manufacturing business? Analysis of different products & players for customized cutting guides and complex instruments
- 3D printing reaches the mass market for a few key products
- Number of implants produced using 3D Printing: Zimmer Biomet, Enovis, Advita, Adler Ortho, etc.
- Standard manufacturing process vs. 3D Printing process: cost comparison
- 3D Printing impact on the forging, casting & machining of implants. The most advanced players in the use of 3D printing: hip cups, tibial knee plates and spinal cages
- Hip: manufacturing process and raw materials vs. other processes: 2025 split by manufacturing process: forged Ti, forged or machined stainless steel, casted CrCo, and 3D printed Ti. 2030 forecasts: forged Ti, forged or machined stainless steel, casted CrCo, and 3D printed Ti
- Knee: manufacturing process and raw materials vs. other processes: 2025 split by manufacturing process: forged Ti, forged or machined stainless steel, casted CrCo, and 3D printed Ti or CrCo. 2030 forecasts: forged Ti, forged or machined stainless steel, casted CrCo, and 3D printed Ti or CrCo
- Cages by manufacturing process: 3D printing, machined and others
- 3D printing in-house & contract manufactured market in MUS\$: 3D printing contract manufacturing & OEMs in-house manufacturing, 2015-2025 & 2025-2030 forecasts
- 2025-2030 predictable growth for 3D printing hip cups, knee tibial plates, shoulder glenoids, spine cages and other printed parts
- Executive summary: 3D Printing market & trends, drivers & limiters, competitive landscape & player strategies, key success factors

V – Top 100 Players in 3D Printing for orthopedics (p. 68)

- Orthopedic OEMs in 3D printing: 35 players
- CMO leaders in 3D printing: 20 players
- CMOs operating in 3D printing: 25 players
- 3D printing machine suppliers: 20 players

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