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The Worldwide Orthopedic & Spine Contract Manufacturing Market Report 2025-2030 & Top 100 Supplier Profiles



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Section VII includes 100 individual supplier profiles (revenues by area & customer, facilities, services, key figures, SWOT). Detailed contents of each section on the following slides.



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The Worldwide Orthopedic & Spine Contract Manufacturing Market Report 2025-2030 & Top 100 Supplier Profiles

Purpose of the Survey and Methodology

Synopsis & Executive summary (p. 14)

- Segmentation
- Worldwide Orthopedic market in 2025: by product & by player
- Worldwide Orthopedic market in 2025: Majors vs. Challengers
- Worldwide Orthopedic market in 2025: life cycle of orthopedic products and forecasts for 2030
- Orthopedic Contract Manufacturing value chain
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- Contract Manufacturing market & trends: Casting
- Contract Manufacturing market & trends: Instrument machining
- Contract Manufacturing market & trends: Instruments is a highly fragmented market
- Contract Manufacturing market & trends: Coating
- Contract Manufacturing market & trends: Cases & trays
- Contract Manufacturing market & trends: Ranking of top players
- Orthopedic Contract Manufacturing market & trends: Top 20, Top 21-100 and Top 101-1,000 distribution of revenues
- Orthopedic Contract Manufacturing market & trends: consolidation by acquisition – Forecasts by service for 2030
- The Orthopedics Contract Manufacturing market is growing faster than in-house manufacturing
- Orthopedic Contract Manufacturing market & trends: Additive Manufacturing for hip, knee, shoulder & trauma
- Orthopedic Contract Manufacturing market & trends: Additive Manufacturing for spine & Additive Manufacturing machines in 2025 and usage forecasts for 2030

I – Orthopedic environment (p. 34)

- 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

I – Orthopedic environment (cont.)

- 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

II – Worldwide orthopedic & spine market: players, drivers & limiters and forecasts 2025-2030 (p. 54)

- Orthopedics Ecosystem
- Worldwide orthopedic markets in 2025 by product
- The Worldwide orthopedics market: Growth 2000-2010 CAGR, 2010-2015 CAGR, 2015-2019 CAGR & 2015-2025 CAGR
- Worldwide implants market in 2025 by value (BUS\$): Knee, hip, spine and by area: USA, Europe, RoW
- Worldwide implants market knee, hip & spine in 2025 by value (BUS\$)
- Worldwide implants market trauma, shoulder & extremities in 2025 by value (BUS\$)



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II – Worldwide orthopedic & spine market: players, drivers & limiters and forecasts 2025-2030 (cont.)

- Hip & Knee sales per area: USA, Europe, Japan, Australia, Korea & RoW
- Ratio for 10,000 inhabitants & growth by area (2025)
- Worldwide orthopedic market in 2025: competition
- Worldwide competition by product in 2025: Market share
- Three types of Challengers competing with the Majors
- Top 4 vs. Challengers for hip & knee worldwide markets: Majors have small growth while challengers are growing faster
- 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 5.2% per year
- Hip, knee & shoulder challengers are growing faster than the market average: Enovis, Medacta, Corin, FX Solutions, Globus, Alphatec, Depuy Spine, Bonesupport
- Hip worldwide market shares 2012-2025: Challengers gained continuous market share, except during the Covid period, then seem to be stable between 2021 and 2025
- Knee worldwide market shares 2012-2025: Challengers gained continuously market share, except during the Covid period, then seem to decline between 2021 and 2025. Stryker is the only Major to gain market share thanks to its lead in surgical robotic systems
- Spine worldwide market shares 2012-2025: Majors limit market share losses by buying rivals – Challengers are growing a lot!
- Trauma worldwide market shares 2012-2025: Challengers gained continuous market share, except the Covid period
- Challengers have continuously gained market share 2018-2025 – except in 2020 due to Covid impact
- Majors vs. Challengers: Revenues CAGR, market shares
- Majors vs. Challengers: 2025 picture
- Challengers growing vs. Majors
- Smith & Nephew and ATEC comparison: average new products launched per year
- Reasons why Challengers are growing faster than Majors (except during Covid crisis)
- Hip ASP erosion in developed countries 2012-2025
- Knee ASP erosion in developed countries 2012-2025
- Forecast price erosion 2025-2030: 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, etc.
- Summary: Orthopedic market

III – Worldwide orthopedic & spine Contract Manufacturing market, OEM strategies, Contract Manufacturers position, market share and forecasts to 2030 (p. 88)

- 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
- OEM contract manufacturing needs: Challengers
- Contract Manufacturing process segmentation & raw materials: 14 segments & 70 sub-segments
- Forging Contract Manufacturing market 2025
- Forging Contract Manufacturing market 2012-2030 by product
- Forging Contract Manufacturing market share in 2025: Tecomet, Marle, Precera Medical, Orchid, etc.
- Forging Contract Manufacturing market: OEMs relationships with their suppliers
- Casting Contract Manufacturing market 2025
- Casting Contract Manufacturing market 2012-2030 by product
- Casting Contract Manufacturing market share in 2025: Orchid, Marle, PCC, etc.
- Casting Contract Manufacturing market: OEMs relationships with their suppliers
- Hip machining & finishing Contract Manufacturing market 2025
- Hip machining & finishing Contract Manufacturing market 2012-2030 by product
- Knee machining & finishing Contract Manufacturing market 2025
- Knee machining & finishing Contract Manufacturing market 2012-2030 by product
- Shoulder machining & finishing Contract Manufacturing market 2025
- Shoulder machining & finishing Contract Manufacturing market 2012-2030 by product
- Spine implants machining & finishing Contract Manufacturing market 2025
- Spine implants machining & finishing Contract Manufacturing market 2012-2030
- Trauma implants machining & finishing Contract Manufacturing market 2025



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The Worldwide Orthopedic & Spine Contract Manufacturing Market Report 2025-2030 & Top 100 Supplier Profiles

III – Worldwide orthopedic & spine Contract Manufacturing market, OEM strategies, Contract Manufacturers position, market share and forecasts to 2030 (cont.)

- Trauma implants machining & finishing Contract Manufacturing market 2012-2030
- Extremities implants machining & finishing Contract Manufacturing market 2025
- Extremities implants machining & finishing Contract Manufacturing market 2012-2030
- Spine, Trauma, Extremities & Shoulder Contract Manufacturing market 2025-2030
- Player market shares: Spine, Trauma, Extremities & Shoulder contract manufacturing in 2025
- What are orthopedic instruments for knee, hip, spine, trauma, shoulder & extremities?
- Knee orthopedic instruments: functional segmentation
- Knee orthopedic instrument segmentation: 150 to 200 pieces
- Hip orthopedic instrument segmentation: 80 to 150 pieces
- Spine instruments: 30 to 50 pieces – Spine orthopedic instruments – product segmentation
- 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 & OEMs destocking period 2024-2025), it also drastically reduces its instruments manufacturing
- Cutting tools – Single-use trend: Single-use is a pressing demand from surgeons
- Cutting tools – Single-use trend: Single-use is growing rapidly in the US and Europe
- Instruments Contract Manufacturing market 2025
- Instruments Contract Manufacturing market 2012-2030 by product
- Instruments Contract Manufacturing market share in 2025: Exalta, Tecomet, Arch, Jabil, etc.
- Orthopedic instrument players – Billing of CMOs by geographical area
- Ranking of instrument contract manufacturing suppliers: Top 10 / Top 11-30 / From 31 – Revenues from instruments and US billings
- Orthopedic robotic market in 2025: MAKO – Stryker, ROSA – Zimmer Biomet, Corin TANVI, Navio – Smith & Nephew, Mazor – Medtronic and Velys – Depuy Synthes
- Navigation vs. robotic-assisted surgery
- Mako's acquisition by Stryker boosted the orthopedic robotic market and had a huge impact on the instruments market
- Orthopedic robotic surgeries: Stryker opened the mass market; Smith & Nephew, Zimmer Biomet, Depuy and many others have followed

III – Worldwide orthopedic & spine Contract Manufacturing market, OEM strategies, Contract Manufacturers position, market share and forecasts to 2030 (cont.)

- New generations of Mako for shoulder and spine surgery planned for the coming years – Roadmap 2013-2025
- Zimmer Biomet with Rosa: roadmap 2013-2025
- Smith & Nephew with Navio & Cori: roadmap 2015-2025
- Depuy Synthes with Velys: roadmap 2018-2025
- Robotic orthopedic system benchmark in detail: CT-scan based or not, technical support, etc.
- Mako, Rosa, Velys and Cori benchmark: operating cost / acquisition cost
- Robotic-assisted surgeries: USA is by far the leading country for robotics usage. 2014-2030 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
- Outside US knee surgeries performed with robotics (in K units, 2020-2030)
- Australia was always a pioneer in the use of innovations in orthopedics, especially for knee robotic-assisted surgeries. Germany, Japan and France situations
- Robotic-assisted surgeries outside the US: between 2025 and 2030, the number of robotic knee operations outside the USA
- What are orthopedic cases & trays?
- Cases & trays Contract Manufacturing market 2012-2030 by product
- Cases & trays Contract Manufacturing top 15 market share in 2025: Tecomet, Viant, Orchid, etc.
- Ceramics Contract Manufacturing market 2025
- Ceramics Contract Manufacturing market 2012-2030 by product
- Ceramics Contract Manufacturing market share in 2025: CeramTec, CoorsTek, Kyocera, etc.
- Coating Contract Manufacturing
- Coating Contract Manufacturing market 2025
- Coating Contract Manufacturing market 2012-2030 by product
- Coating Contract Manufacturing market share in 2025: Orchid, DOT, APS Materials, Lincotek, etc.
- Marking, Packaging & Sterilization – MPS Contract Manufacturing market 2025
- MPS Contract Manufacturing market 2012-2030 by product
- Contract Manufacturing market value chain
- Contract Manufacturers worldwide orthopedics revenues in 2025 (in MUS\$) – The Top 25: Jabil Healthcare, Tecomet, Arch Medical, Paragon, Exalta, etc.



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The Worldwide Orthopedic & Spine Contract Manufacturing Market Report 2025-2030 & Top 100 Supplier Profiles

III – Worldwide orthopedic & spine Contract Manufacturing market, OEM strategies, Contract Manufacturers position, market share and forecasts to 2030 (cont.)

- CMO top players: 2017-2025 main M&A activity
- Tecomet revenues by area and by customers 2019-2025
- Orchid revenues by area and by customers 2019-2025
- Viant revenues by area and by customers 2019-2025
- Avalign revenues by area and by customers 2019-2025
- CMO leaders: presence in different services: forging, casting, machining, coating, instruments, cases & trays, and packaging
- CMO leaders: Tecomet, Orchid and Viant – Strengths & Weaknesses
- Contract Manufacturing competitor ranking & dispersion: Top 20 / Top 21-100 / Top 101 to >1,000
- Billing for orthopedic instruments by geographical area and by players: Jabil, Exalta, 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
- Continuous 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
- The risk of moving to LLC by 2030
- Contract Manufacturing price range dashboard in 2025
- Orthopedics Contract Manufacturing market is growing faster than in-house manufacturing: in 2024 & 2025 significant destocking by major orthopedic companies has reduced orders and slowed the growth of the contract manufacturing market
- Contract Manufacturing market is growing at a higher rate than the orthopedic market – Main drivers for this faster growth: 1) growth in orthopedic company outsourcing rate, 2) facility disinvestments
- Contract Manufacturing market historical revenues & forecasts (MUS\$) 2012-2025 – In detail: forging, casting, 3D printing, hip / knee / shoulder / spine / trauma / extremities / instrument / cases & trays machining & finishing, ceramics, coating, marking, packaging and sterilization – CAGR 2012-2025

III – Worldwide orthopedic & spine Contract Manufacturing market, OEM strategies, Contract Manufacturers position, market share and forecasts to 2030 (cont.)

- Contract Manufacturing market historical revenues & forecasts (MUS\$) 2025-2030 – In detail: forging, casting, 3D printing, hip / knee / shoulder / spine / trauma / extremities / instrument / cases & trays machining & finishing, ceramics, coating, marking, packaging and sterilization – CAGR 2025-2030

IV – 3D Printing in Orthopedics (p. 209)

- 3D Printing & Trabecular in Orthopedics
- 3D Printing history in Orthopedics
- Story of Zimmer and Trabecular Tantalum
- Zimmer, Trabecular Metal related implants
- 3D Printing manufacturing: technologies and major competitors – EOS, SLM Solutions, Concept Laser (GE), Arcam (GE), etc.
- Arcam EBM installed base for orthopedic industry: Lima
- Beijing AK Medical EBM installed base
- Implantcast EBM machines installed base from Arcam
- Illustrative build-up speed and resolution of selected metal 3D printing systems: EBM vs. Selective Laser Melting
- Smith & Nephew usage of 3D printing for customized cutting blocks
- Stryker's history of 3D printing: Stryker to build a 3D printing manufacturing facility for more than \$400 million
- Stryker's current products made by 3D printing: knee, cages, etc.
- Depuy Spine usage of 3D printing for prototyping of complex surgical tools
- Depuy Synthes has acquired 3D printing technology from Tissue Regeneration Systems Inc.
- 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, Renishaw and their customers
- Dozens of companies mentioned the number of 3D printing machines and type of machines
- Addressable market should increase with lower 3D printing cost: cost and complexity curve linked with addressable market
- Additive Manufacturing is attractive for reconstructive implants
- Number of implants produced using 3D printing: Zimmer Biomet, Lima (Enovis), Exactech, Adler Ortho
- FDA clearance for medical devices using 3D printing in the USA
- 3D printing has reached the mass market for a few key products



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IV – 3D Printing in Orthopedics (cont.)

- 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-printed cages are gaining market share over PEEK and titanium cages
- 3D Printing in 2025
- 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
- Is 3D printing 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
- Lincotek 3D printing activities in detail
- Major Contract Manufacturers: 3D printing investments and strategies – Tecomet, Orchid, Lincotek, Marle, C&A Tool, DRT Medical and many others
- Most large contract manufacturers are investing in 3D printing: Orchid, Lincotek, Marle, Paragon, Norman Noble and many others – detail of the 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 product (hip cup, knee tibial, shoulder glenoid, spine cage, etc.): 2015-2030
- In-house and contract manufacturing market by customer: Depuy Synthes, Stryker, Smith & Nephew, Zimmer Biomet, Medtronic, etc.
- 3D printing contract manufacturing market by supplier in 2025
- 3D printing for orthopedics: Executive summary

V – Orthobiologics / Cobalt Chrome / ASC (p. 244)

- The global value chain of bone substitutes & cements
- Synthetic or natural bone substitutes, allografts, must satisfy many needs: injectable substitutes or more abundant allografts

V – Orthobiologics / Cobalt Chrome / ASC (cont.)

- Top bone grafts on the market: injectables and antibiotics are the main drivers
- Cement comes with various viscosity characteristics and antibiotic content
- Use of antibiotics for orthopedic cements: need for cements with new antibiotics
- Worldwide orthobiologic markets in 2025: cements, bone substitutes, etc.
- Cobalt-Chrome & EU Regulation 2017/745
- Cobalt-Chrome is used today in 6 major orthopedic products: femoral knee, dual mobility liner, hip and shoulder heads, bipolar cups and tibial knee plates. The use of Co-Cr varies depending on the geographical area
- Anti-allergic solutions against nickel, cobalt, etc.
- Ambulatory Surgery Center – ASC forecast in the USA

VI – FX rate variation & Impact of Tariffs (p. 255)

- FX rate variation from January 2018 to December 2025
- 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: major CMOs are negatively impacted on their share of sales in Europe
- Impact of Tariffs
- Worldwide orthopedic market forecasts
- Opportunities and risks for the orthopedic end-user market
- Opportunities and risks for orthopedic contract manufacturing
- Summary: Orthopedic market
- Summary: Orthopedic Contract Manufacturing market

VII – Contract manufacturing competitor ranking, Top 100 profiles and SWOT analysis of the leaders (p. 266)

- Top 100 supplier profiles – examples: Jabil Healthcare, Tecomet, Arch Medical Solutions (revenues by area & customer, facilities, services, key figures, SWOT)

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