

World Arthroscopy Markets 2008

Report Highlights

September 2008

Report Benefits

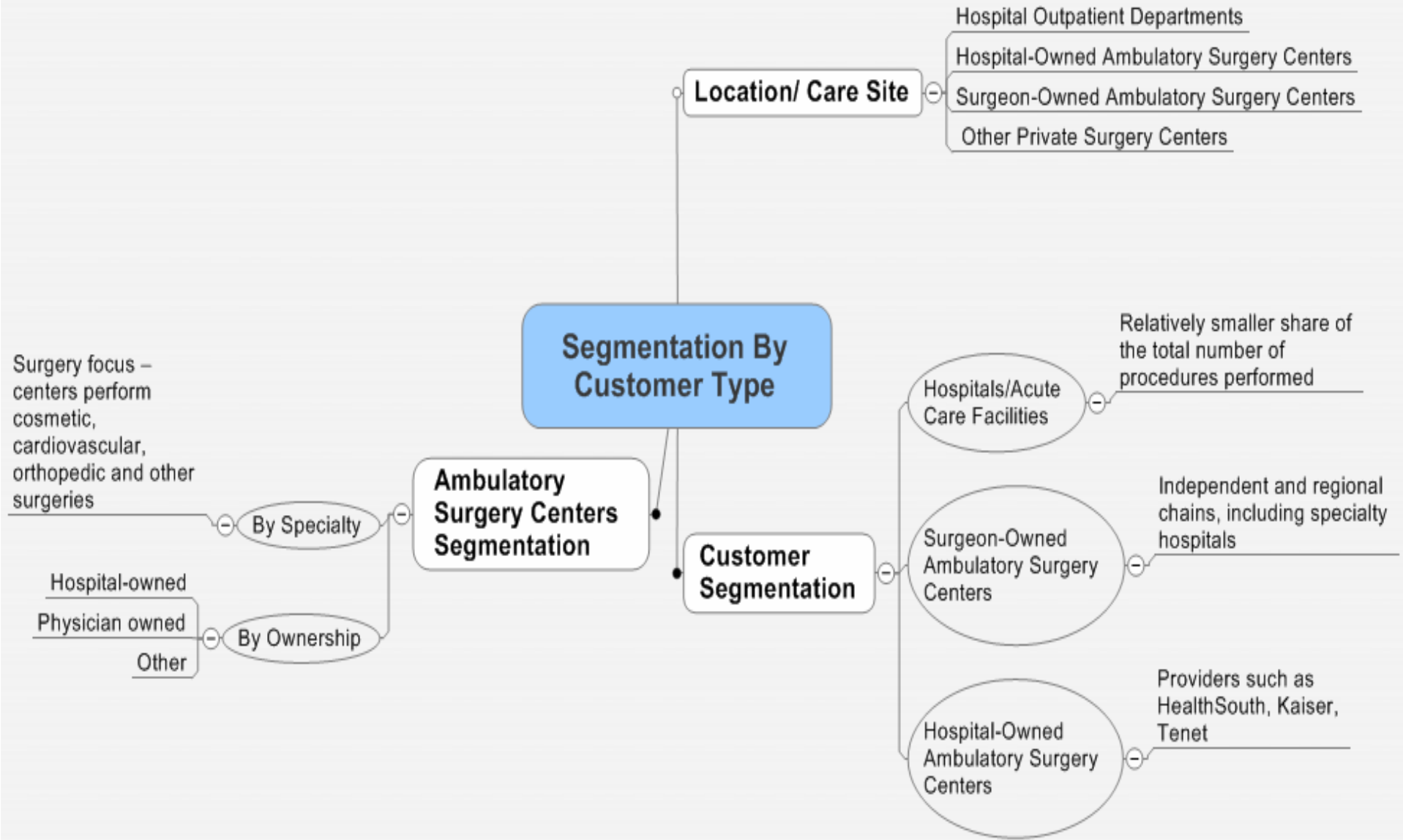
This report can help in:

- Assessing the market for Arthroscopy Devices worldwide, growth segments, and growth regions.
- Understanding market drivers and restraints, market segmentation, and competitive segmentation.
- Strategic planning and competitive strategy.
- Identifying opportunities for partnerships and alliances.

Key Takeaways

- The total US market for arthroscopy devices is estimated to have been \$1 billion in revenues in 2007, growing to \$1.71 billion by the end of 2014 at a CAGR of 8.0 percent.
- Smith & Nephew is the market leader in the arthroscopy space, other leading players being Arthrex, Arthrocare, Biomet, Davol, DePuy/Mitek, Stryker, and Linvatec/Conmed.
- Continued growth is expected in this market over the next few years, primarily due to increased demand for minimally invasive procedures, physician preference, and increases in orthopedic problems.

Segmentation By Customer Type



Key Market Drivers

- Growth in the US market is mainly driven by the use of arthroscopic procedures for orthopedic problems, in particular those related to sports medicine.
- Growth in Europe is driven primarily by demand for minimally invasive procedures and increased healthcare spending for the elderly.
- Growth in the Asia Pacific Region, particularly in China is driven by a substantial increase in socio-economic conditions allowing people to seek improved healthcare with the latest technologies. Increase in sports activities in China is also leading to more sports-related injuries.
- Physician and patient preference for endoscopic diagnostic and surgical techniques as a minimally invasive alternative to traditional methods.

Sample Market Table

WORLD ACL/PCL RECONSTRUCTION DEVICES REVENUE FORECASTS BY COUNTRY / REGION (\$ MILL, 2006-2014)

Segment	2006	2007	2008	2009	2010	2011	2012	2013	2014	CAGR
United States										
Canada & LATAM										
Europe										
Japan										
ROAPAC										
ROW										
Total										

Notes:

1. Includes Bone-Patellar Tendon-Bone Fixation Devices (Resorbable and Nonresorbable); Soft Tissue Fixation Devices (Femoral and Tibial); Surgical Instruments; Disposables
2. Devices are used in Bone-Patellar Tendon-Bone Grafting; Soft Tissue Grafting procedures
3. LATAM includes all Latin American countries (Mexico, Brazil, Argentina, and other countries in the region); ROAPAC (Rest of Asia-Pacific) includes all countries in the Asia-Pacific region except Japan. ROW (Rest of the World) includes Africa and the Middle East
4. Data are at the manufacturer level

Source: Marketstrat™

Report Stats

Regions Covered	United States; Canada & Latin America; Europe; Japan; Rest of Asia-Pacific (ROAPAC), Rest of the World (ROW)
Product/Market Segments	<ul style="list-style-type: none">• ACL/PCL Reconstruction Devices• Arthroscopes• Arthroscopic Hand Instruments• Fluid Management Devices• Meniscal Repair Devices• Powered Shaver Systems and Disposables• Radiofrequency Probes• Shoulder Fixation Devices• Knee Cartilage Repair Devices• Rotator Cuff Reinforcement• Reprocessed Arthroscopy Devices
Companies Profiled	~ 62 companies worldwide
Market Estimates/ Forecasts	In US dollars for 2006-2014
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