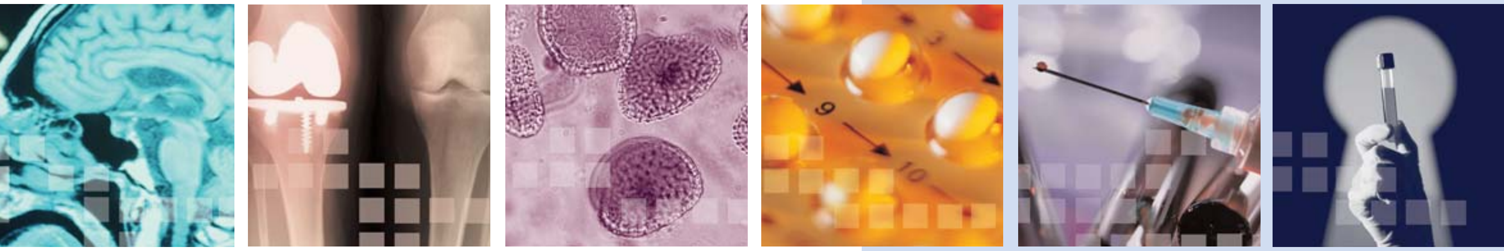

A Datamonitor report

Hip and Knee Replacement Market

Published: Sep-06 Product Code: DMHC2264

Providing you with:

- **Comprehensive** analysis of the size, value and growth prospects of the US and European hip and knee replacement markets
- **Summary** of key developments in the field of hip and knee replacement procedures
- **SWOT** analysis of the US and EU hip and knee replacement markets
- **Comparative** analysis of the key players in the markets

Use this report to...

Evaluate the size of the US and European hip and knee replacement markets, in terms of number of replacements and value

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Introduction

The orthopedic joint replacement market is at a crossroads between time-tested conventional procedures and advanced implant materials and surgical techniques. Demand driven by an aging population and an increasing number of younger patients undergoing hip and knee replacement procedures together with improved implant materials and surgical techniques are contributing to growth in this mature market.

Surgeons now have more choices of implant materials and newer techniques that enable them to provide better treatment outcomes for patients undergoing joint arthroplasty surgeries. Innovation by implant manufacturers in introducing new product solutions and procedure techniques; combined with positive clinical outcomes of products introduced in the past four years are expected to bring in growth rates of 6.0-8.0% for hip replacements and a 12.0% growth rate in knee replacements.

Key findings and highlights

- The US and European hip and knee implants are the two largest markets for hip and knee implants with the US accounting for nearly 50 per cent and Europe contributing to around 30 per cent of total procedures worldwide.
- Hip and knee replacements are mature markets in the US and Europe with knee procedures and revenues growing at a higher rate than hip replacement procedures and revenues. The 2005 revenues for hip implants in the US were $2 billion and that for Europe was $1.4 billion. Knee implant revenues for 2005 was $2.4 billion in the US and $774m in Europe.
- The average prices for hip implants grew by 2.0-3.0 per cent from 2004 to 2005 while that of knees grew by 3.0-4.0 per cent. Going forward, market growth is expected to be driven by increasing demand for hip and knee replacements as the baby boom generation nears retirement and an increasing number of younger patients undergo hip and knee replacement procedures.

Reasons to buy

- **Evaluate** the size of the US and European hip and knee replacement markets, in terms of number of replacements and value
- **Assess** the key factors driving and restricting market growth over the coming years
- **Analyze** the competitive landscape in each market and identify the key players

For more information...

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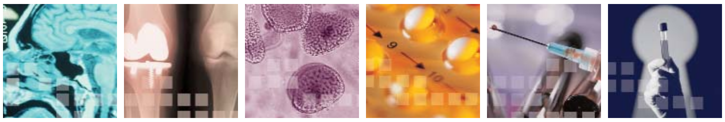

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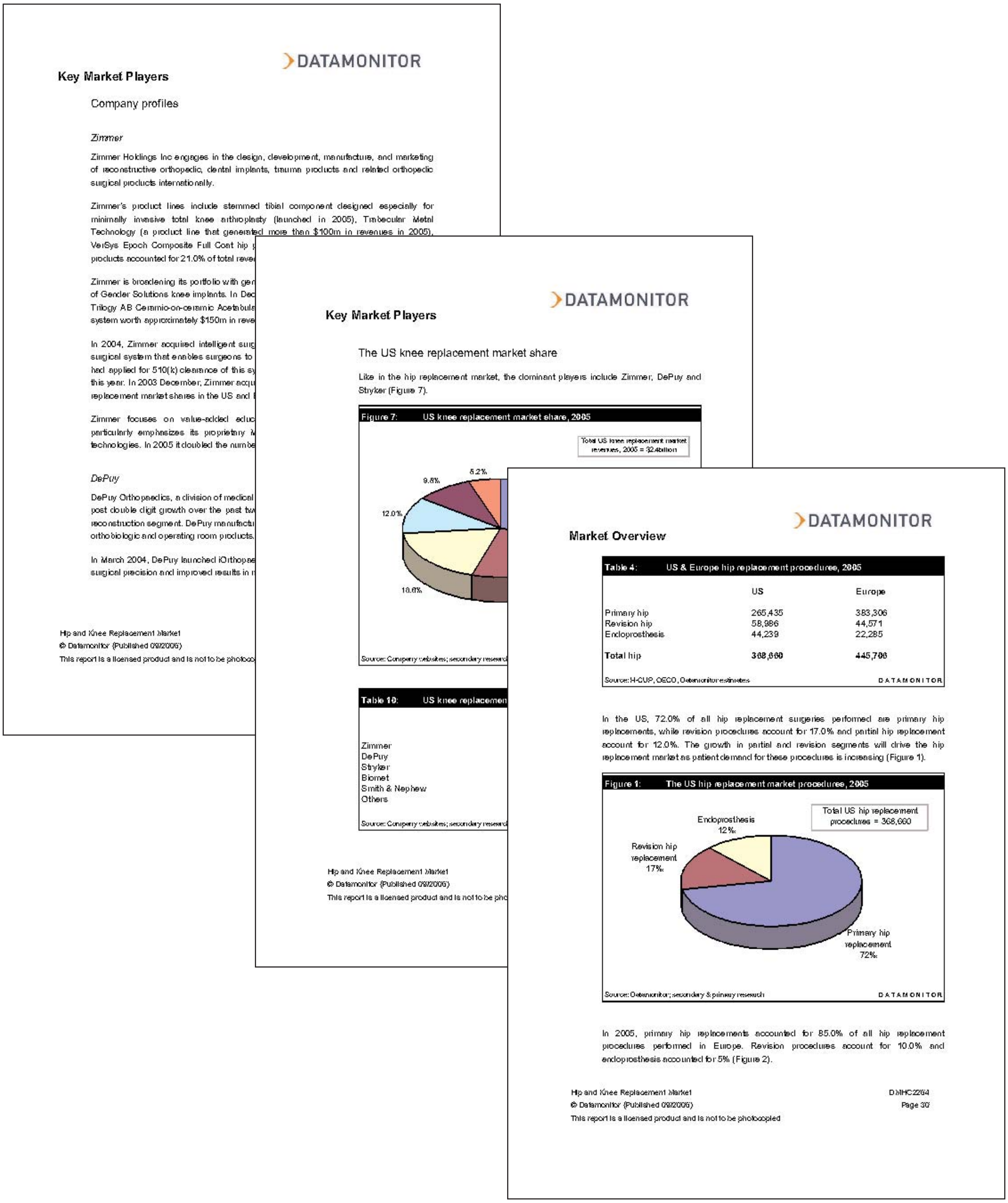

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Key Market Players

Company profiles

Zimmer

Zimmer Holdings Inc engages in the design, development, manufacture, and marketing of reconstructive orthopedic, dental implants, trauma products and related orthopedic surgical products internationally.

Zimmer's product lines include stemmed tibial component designed especially for minimally invasive total knee arthroplasty (launched in 2005), Trabecular Metal Technology (a product line that generated more than $100m in revenues in 2005), VerSys Epoch Composite Full Coat hip … products accounted for 21.0% of total reve…

Zimmer is broadening its portfolio with ge… of Gender Solutions knee implants. In Dec… Trilogy AB Ceramic-on-ceramic Acetabula… system worth approximately $150m in reve…

In 2004, Zimmer acquired intelligent surg… surgical system that enables surgeons to … had applied for 510(k) clearance of this sy… this year. In 2003 December, Zimmer acqu… replacement market shares in the US and …

Zimmer focuses on value-added educ… particularly emphasizes its proprietary … technologies. In 2005 it doubled the numbe…

DePuy

DePuy Orthopaedics, a division of medical … post double digit growth over the past tw… reconstruction segment. DePuy manufactu… orthobiologic and operating room products.

In March 2004, DePuy launched iOrthopae… surgical precision and improved results in …

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Key Market Players

The US knee replacement market share

Like in the hip replacement market, the dominant players include Zimmer, DePuy and Stryker (Figure 7).

Figure 7: US knee replacement market share, 2005

Total US knee replacement market revenues, 2005 = $2.4billion

5.2%
9.8%
12.0%
18.6%

Source: Company websites; secondary researc…

Table 10: US knee replacemen…

Zimmer
DePuy
Stryker
Biomet
Smith & Nephew
Others

Source: Company websites; secondary researc…

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Market Overview

Table 4: US & Europe hip replacement procedures, 2005

	US	Europe
Primary hip	265,435	383,306
Revision hip	58,986	44,571
Endoprosthesis	44,239	22,285
Total hip	**368,660**	**445,706**

Source: H-CUP, OECD, Datamonitor estimates DATAMONITOR

In the US, 72.0% of all hip replacement surgeries performed are primary hip replacements, while revision procedures account for 17.0% and partial hip replacement account for 12.0%. The growth in partial and revision segments will drive the hip replacement market as patient demand for these procedures is increasing (Figure 1).

Figure 1: The US hip replacement market procedures, 2005

Total US hip replacement procedures = 368,660

Endoprosthesis 12%
Revision hip replacement 17%
Primary hip replacement 72%

Source: Datamonitor; secondary & primary research DATAMONITOR

In 2005, primary hip replacements accounted for 85.0% of all hip replacement procedures performed in Europe. Revision procedures account for 10.0% and endoprosthesis accounted for 5% (Figure 2).

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"...More and more aged people want better quality of life compared to their earlier generation. There are people with arthritis and similar conditions above the age of 65 and 70 wanting to be active, wanting to play golf and wanting to socialize..."

Key opinion leader, Hip and Knee Replacement Market

Table of contents

FIGURES

"...Mobile bearing knees with uncemented implants are being used for knee arthroplasty. There is a shift from fixed bearing knees to mobile bearing knees primarily due to better mobility and longevity of the mobile bearing implants..."

Key opinion leader, Hip and Knee Replacement Market

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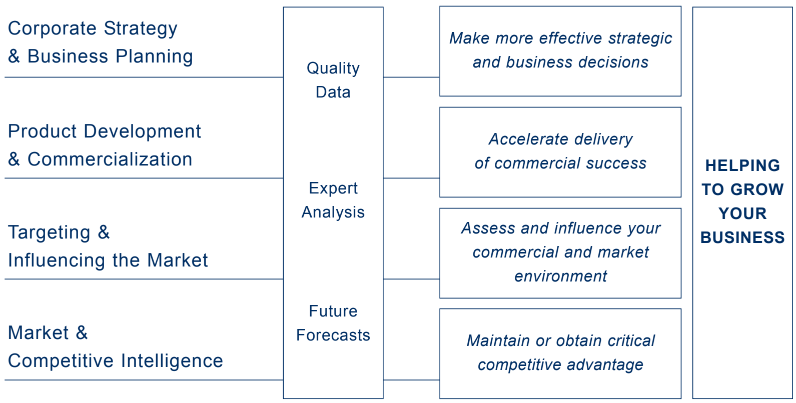

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